TVS MOTOR COMPANY

DEALER MANAGEMENT SYSTEM

THE COMPLETE HANDBOOK

Operations • Master Data • Service Documents • Ledger & Accounts • Reports Catalogue

FIVE PARTS IN ONE VOLUME

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Author's Note

लेखकाचे मनोगत

This book exists because of a simple belief: knowledge that stays locked inside one person's head helps only that one person, but knowledge that is written down, organised, and shared helps an entire team, for years, long after the person who first learned it has moved on to something else.

Every page that follows was written from hands-on, everyday experience of working with the TVS Dealer Management System — not from a manual handed down from someone else, but from the questions that actually come up on a busy sales floor, at a parts counter, and in a workshop bay: why can't I find this part, why does this customer already exist, why did this claim get rejected, why doesn't this number match the bank statement. Each answer, once worked out, was written down so that the next person would not have to work it out alone, from scratch, the hard way.

The five parts of this book were originally written separately, at different times, as different needs came up. They are brought together here as one volume because together they tell a more complete story than any one of them could alone: how a dealership's core operations, its master data, its everyday service documents, its financial ledgers, and its reporting all fit together as a single, connected system, rather than five unrelated topics.

The spread of knowledge — ज्ञानाचा प्रसार — is the only reason this book was worth the time it took to write. If even one new team member learns something here faster, or more clearly, or with fewer mistakes than they would have otherwise, that purpose has been served.

— श्री. योगेश मिरजकर

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PART I

Core DMS Operations

This part covers the TVS Dealer Management System end to end — login and navigation, the Sales, Spare Parts, Service, Warranty, CRM, Accounts and Reports modules, user administration, daily best practice, frequently asked questions, troubleshooting, a sample form appendix, and a glossary.

Chapters in this part:

- Introduction to the TVS Dealer Management System
- Getting Started: Login, Navigation and the Dashboard
- Master Data — The Foundation of the DMS
- The Sales Module
- Spare Parts and Inventory Management
- The Service / Workshop Module and the Digital Job Card
- Warranty Claims Management
- Customer Relationship Management (CRM)
- Accounts, Finance and GST/VAT Workflows
- Reports, MIS and KPI Dashboards
- User Roles, Access Control and Administration
- Best Practices, Checklists and Common Mistakes
- Frequently Asked Questions
- Troubleshooting Common DMS Issues
- Appendix A — Sample Form Field Reference
- Glossary of Key Terms
- Closing Notes

1. Introduction to the TVS Dealer Management System

A Dealer Management System, universally shortened to DMS, is the single software platform through which an authorised TVS dealership runs every part of its daily business: ordering vehicles from the factory, tracking every unit in stock, recording every sale, running the service workshop, managing the spare parts store, handling accounts, and reporting performance back to TVS Motor Company headquarters. In a modern TVS dealership, the DMS is not an optional convenience — it is the digital backbone of the franchise, and full adoption of the system is a condition of the dealership agreement itself.

1.1 Why TVS Requires a DMS

TVS Motor Company is one of India's largest two-wheeler and three-wheeler manufacturers, selling several million units a year through a network of thousands of dealers spread across India and dozens of export markets, including Zambia. Coordinating vehicle allocation, warranty, pricing, and after-sales support across such a large network by phone calls and paper registers would be impossible. The DMS connects every dealer outlet directly to TVS's central servers, so that:

- Vehicle orders and stock movements are visible to TVS in real time.
- Warranty claims can be verified against the exact vehicle history and settled correctly.
- Spare parts ordering, pricing and stock levels stay consistent across the whole network.
- Sales, service and customer data feed into monthly and annual performance reporting for both the dealer and TVS.
- Every dealer, regardless of country or branch size, follows the same core process discipline, which protects the TVS brand promise of quality and consistent after-sales care.

1.2 History and Evolution of TVS DMS

The current TVS DMS platform, marketed to dealers under the name TVS Advantage (also referred to internally as eMoS), has evolved considerably since it was first introduced. TVS initially worked with implementation partners to build a dealer-focused system layered on top of the company's SAP ERP backbone, with modules for finance, inventory, service and customer analysis. Over the following years, as the dealer network grew past four thousand outlets, TVS undertook a major modernisation of the platform — moving from an older desktop-based application to a faster, browser- and mobile-accessible system built on modern web technology. The result was significantly quicker screen loading, wider accessibility from branch computers and handheld devices, and a large reduction in system errors experienced by dealer staff.

> ***Good to know:*** *Because the DMS is continually being upgraded, exact menu names or button positions described anywhere in this book may shift slightly over time. Always treat the workflow logic as the constant, and the exact screen as something to confirm locally with your Dealer Admin.*

1.3 Who Uses the DMS

Every functional area of the dealership touches the DMS in some way. The system is built around role-based access, meaning each staff member logs in with a role that determines exactly which screens and functions they can see and use:

Role	Primary DMS Responsibility
Dealer Admin	Overall system control, user creation, master data, branch settings
Sales Executive / Manager	Leads, bookings, allocation, invoicing, delivery
Service Advisor / Technician	Job cards, labour entries, technician assignment, warranty
Spare Parts / Store Keeper	Purchase orders, GRN, stock, counter and workshop issues
Accounts / Cashier	Receipts, payments, ledgers, GST/VAT, bank reconciliation
CRM / Front Office	Enquiry logging, follow-ups, customer satisfaction, complaints

1.4 System Architecture: How the Pieces Fit Together

It helps to understand, in simple terms, what actually happens behind the screen every time you press Save. The DMS is a client-server system: your branch computer or handheld device is the client, and it talks over the internet to a central server operated by, or on behalf of, TVS Motor Company. Every module you use — Sales, Service, Spares, Accounts — is really just a different view into the same underlying database, which is why a vehicle sold in the Sales module instantly shows up as 'sold' in the Spares stock ledger and in the Accounts customer ledger without anyone re-typing the information.

- Presentation layer — the screens, forms and menus you interact with in your browser or app.
- Application layer — the business rules (for example, 'a vehicle cannot be allocated twice', or 'a job card cannot be closed with parts still pending') enforced centrally so every dealer follows the same rules.
- Database layer — the single, authoritative store of every transaction, held on TVS's central servers and backed up according to TVS's data-retention policy.

1.5 Hardware, Network and Access Requirements

A typical DMS workstation needs a reasonably current web browser, a stable internet connection, and — for roles that print documents — a receipt or A4 printer configured for invoices, job cards and GRN slips. Because the system is centrally hosted, a poor or interrupted internet connection is the most common cause of slow performance or failed saves; dealerships in areas with less reliable connectivity should keep a documented fallback procedure (for example, a paper job card format) for genuine outage situations, with the understanding that all details must be entered into the DMS retrospectively as soon as the connection is restored.

1.6 Benefits of Disciplined DMS Use

Dealerships that use the DMS with real discipline — entering data as events happen rather than in batches, and treating every module as the single source of truth — consistently see faster job card turnaround, fewer stock discrepancies, cleaner warranty claim acceptance rates, and more accurate month-end accounts than dealerships that treat the DMS as an afterthought to paper records. This handbook is built around that principle: the system only gives back the value that disciplined, timely data entry puts into it.

1.7 How This Book is Organised

Chapter 2 covers how to log in and navigate. Chapter 3 covers Master Data — the reference information every other module depends on. Chapters 4 through 9 cover the Sales, Spare Parts, Service, Warranty, CRM and Accounts modules in full field-by-field detail with worked examples. Chapter 10 covers Reports and KPIs. Chapters

11 and 12 cover user administration and daily best practice. Chapters 13 and 14 answer frequently asked questions and walk through troubleshooting steps for common problems. The appendix and glossary at the end provide quick-reference material you can turn to at any time.

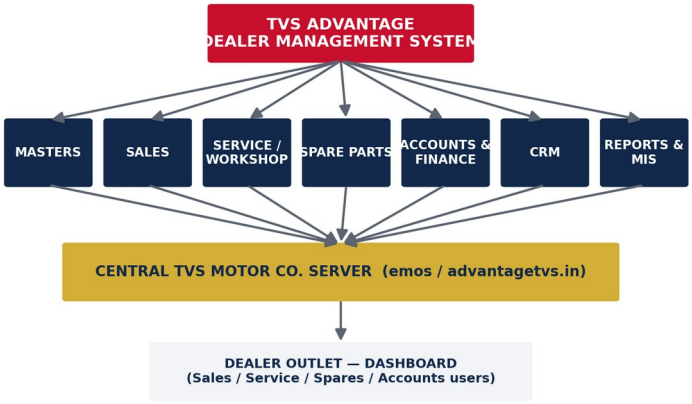

Figure 1.1 — TVS DMS Module Map

Figure 1.1 — TVS DMS Module Map: how the seven core modules connect to the central TVS server and the dealer outlet dashboard.

2. Getting Started: Login, Navigation and the Dashboard

Before any daily work can begin, every DMS user must understand how to access the system correctly and how to read the main dashboard. This chapter walks through the login sequence step by step, explains the layout you will see once you are inside the system, and covers the account-management basics every user should know.

2.1 Logging In

Access to the TVS DMS is through a secure portal (accessed via a web browser or a dedicated dealer app, depending on your dealership's setup). Login always follows the same five-step sequence:

1. Open the DMS portal or app on your workstation or handheld device.
2. Enter your Dealer Code — the unique code TVS has assigned to your outlet.
3. Select your Role from the list (for example: Sales, Service, Spares, Accounts, Support, or Dealer Admin).
4. Select your Branch (for a multi-branch dealer such as Zamoto TVS, this distinguishes Lusaka, Ndola and Solwezi) and your preferred Language.
5. Enter your personal User ID and Password, then click Login.

On successful login, the system typically prompts a stock confirmation screen — a quick check that opening stock figures match what is physically on the shelves — before taking you to your role-specific dashboard.

Open DMS Portal / App
Enter Dealer Code
Select Role (Sales/Service/ pares/Accounts
Select Branch & Language
Enter User ID & Password
Dashboard & tock Confirmati

Figure 2.1 — DMS Login & Access Sequence

Figure 2.1 — The standard DMS login sequence, from opening the portal to reaching your dashboard.

> ***Security reminder:*** *Never share your User ID and Password with a colleague, even temporarily. Every action in the DMS — every job card closed, every discount given, every stock issued — is logged against the user who was logged in at the time. Shared logins make it impossible to trace errors or protect staff from being blamed for someone else's mistake.*

2.2 Password Policy and Account Security

Most TVS DMS deployments enforce a minimum password complexity (a mix of upper- and lower-case letters, numbers, and a minimum length), automatic session timeout after a period of inactivity, and a mandatory password change at first login and at regular intervals thereafter. If you forget your password, the Dealer Admin can trigger a reset from the User Management screen; individual users cannot reset another user's password without that administrative access.

2.3 Understanding the Dashboard

Once logged in, your dashboard is organised around a small number of top-level menus. Although the exact icons vary by DMS version, four groupings appear consistently across TVS dealer systems:

- Masters — reference data such as vehicle models, price lists, customer records, employee records, and branch/godown settings (covered fully in Chapter 3).
- Transactions — the day-to-day entries specific to your role: sales bookings, job cards, purchase orders, receipts, and so on.
- Reports — pre-built and customisable reports covering sales, service, inventory, and financial performance.
- Utilities / Settings — user management, printer setup, data backup, and system preferences (usually restricted to Dealer Admin).

Most dashboards also show a set of at-a-glance tiles or widgets relevant to your role — for example, a service advisor's dashboard typically shows the count of open job cards, vehicles awaiting quality check, and today's scheduled appointments, while a parts store keeper's dashboard highlights low-stock alerts and pending GRNs.

2.4 Switching Branches and Language

Users with access to more than one branch (typically Dealer Admin and senior management roles) can switch the active branch from a selector in the top navigation bar without logging out. This is especially relevant for a multi-branch dealer group such as Zamoto TVS, where a manager may need to review Ndola's stock position in the morning and Solwezi's service performance in the afternoon, all from the same login. The language selector changes on-screen labels only; underlying data (customer names, part descriptions, and so on) is stored exactly as entered, regardless of display language.

2.5 Basic Navigation Habits Worth Building Early

6. Always confirm you are working in the correct branch before starting a transaction — this matters most for multi-branch dealers.
7. Use the search/filter fields on list screens (by chassis number, customer name, job card number, or invoice number) rather than scrolling through long lists.
8. Save or submit each screen before navigating away; unsaved entries are usually lost if you close the tab or press back.
9. Log out (rather than simply closing the browser) at the end of your shift, especially on shared workstations.
10. Bookmark or pin the specific transaction screens you use most often, if your DMS version supports it, to save navigation time.

2.6 Common Login Problems

Symptom	Likely Cause	First Step
‘Invalid credentials’ message	Wrong dealer code, role, or branch selected	Re-check each field before re-entering the password
Account locked	Too many failed password attempts	Contact Dealer Admin to unlock the account
Dashboard loads but modules are missing	Role permissions not yet configured for this user	Contact Dealer Admin to review role assignment
Session expires mid-task	Prolonged inactivity or unstable connection	Save work frequently; check network stability

3. Master Data — The Foundation of the DMS

Before any transaction — a sale, a job card, a purchase order — can be entered correctly, the reference information behind it, known as Master Data, must be set up accurately. Master Data is deliberately restricted to Dealer Admin and a small number of senior users, because an error here (a wrong price, a wrong tax rate, a duplicate customer record) can quietly cause incorrect transactions across every module for weeks before it is noticed.

3.1 Vehicle Model Master

This holds every model and variant the dealership is authorised to sell — model name, engine capacity, colour options, ex-showroom price, and the standard accessory list. TVS pushes model master updates centrally when new models launch or prices change, but dealer-level fields (such as local on-road price components) must still be maintained by the Dealer Admin.

3.2 Price List Master

Price lists tie together the ex-showroom price, taxes, registration charges, insurance, and any dealer-level accessory bundles into the final on-road price shown to a customer. Because pricing errors are highly visible to customers and directly affect revenue, most dealerships restrict price list edits to Dealer Admin and require a second-person check before a price change goes live.

3.3 Customer Master

Every individual or company that buys a vehicle, books a service, or purchases parts should exist exactly once in the Customer Master, identified by a unique combination of name, contact number, and ID/registration document. Duplicate customer records are one of the most common Master Data problems in any dealership — they split a single customer's history across two records, making service reminders, CRM follow-up, and loyalty tracking unreliable. Always search for an existing customer before creating a new record.

3.4 Employee / User Master

Every staff member with DMS access has an employee record linked to their user login, their assigned role, and their branch. This record is also what technician productivity, sales executive performance, and commission reports are built from, so it must be kept current as staff join, move branch, or leave.

3.5 Tax Master

Tax rates (GST in India, VAT in Zambia and other markets) are configured once in the Tax Master and then applied automatically to every relevant transaction. When a government changes a tax rate, this is the only place it needs to be updated — provided every invoice type correctly references the Tax Master rather than a hard-coded figure.

3.6 Labour Master

The Labour Master lists every standard repair or service operation the workshop performs, each with a labour code, a description, and a standard time (and, where the dealership charges for labour, a standard rate). This is what makes labour billing on a job card consistent between technicians and between visits, rather than being negotiated case by case.

3.7 Branch / Godown Master

For a multi-branch dealer, each physical location (and each stock-holding location, or godown, within a branch) is set up once in this master, which is what allows stock, sales and service data to be correctly separated by branch while still rolling up into consolidated group reporting.

3.8 Golden Rule for Master Data

> ***Golden rule:*** *Create once, reuse always. Before adding any new customer, model, or part record, search the existing master first. A five-second search habit prevents hours of reconciliation work later.*

4. The Sales Module

The Sales module manages the complete journey of a vehicle from the moment a prospective customer first shows interest, through to the day the vehicle is handed over. Because TVS ties vehicle allocation and dealer incentives to data recorded in this module, disciplined and timely data entry here has a direct financial impact on the dealership.

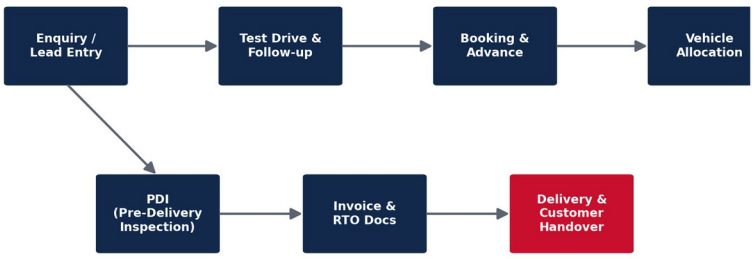

Figure 3.1 — End-to-End Vehicle Sales Lifecycle in DMS

Figure 4.1 — The end-to-end vehicle sales lifecycle as it is recorded in the DMS.

4.1 Enquiry and Lead Management

Every walk-in visitor, phone enquiry, or digital lead should be logged in the DMS on the same day it occurs. Typical fields captured at this stage include the customer's name and contact details, the model and variant they are interested in, the source of the enquiry, and the sales executive assigned to follow up.

Lead Source	Typical Follow-up Approach
Walk-in	Same-day test drive offer; log immediately while details are fresh
Phone enquiry	Confirm details by callback; invite for a showroom visit
Referral	Acknowledge the referring customer; prioritise fast response
TVS website / digital lead	Respond within the SLA set by TVS regional office
Social media	Move the conversation to a direct call or showroom visit quickly

4.2 Test Drive and Follow-up

The system allows a test drive to be scheduled and recorded against the enquiry, and generates reminders for the sales executive to follow up at set intervals — typically at 24 hours, 3 days, and 7 days after the initial enquiry if no decision has been made. Consistent follow-up, tracked through the DMS rather than through memory or personal notebooks, is one of the biggest drivers of conversion rate in any TVS dealership.

4.3 Booking and Advance

When a customer decides to proceed, a booking is created in the DMS, capturing the model, colour, accessories, on-road price breakup, financing details (if applicable), and the advance amount received. The booking record becomes the basis for every subsequent step, including vehicle allocation.

On-Road Price Breakup — Typical Components

Component	Description
Ex-showroom price	Base price of the model/variant from the Price List Master
Taxes (GST/VAT)	Calculated automatically from the Tax Master
Registration charges	RTO or equivalent local registration authority fee
Insurance	First-year (or as selected) insurance premium
Accessories	Optional dealer-fitted accessories selected by the customer
Handling / logistics charge	Dealer-level charge, where applicable, for vehicle preparation

4.4 Financing and NBFC Coordination

Where a customer opts for financing, the DMS records the financier/NBFC name, the loan amount, down payment, and disbursement status against the booking. Many DMS platforms support direct data exchange with partner financiers, reducing paperwork and speeding up disbursement; where this integration is not available, the sales executive must track disbursement manually against the booking until the loan amount is confirmed received.

4.5 Vehicle Allocation

Allocation matches a specific vehicle — identified by its unique chassis and engine number — from dealer stock (or an incoming order) against a confirmed booking. The DMS prevents the same physical vehicle from being allocated to two different customers, which is one of the most valuable safeguards it provides over manual, register-based allocation.

4.6 Pre-Delivery Inspection (PDI)

Before a vehicle can be invoiced, workshop staff carry out a Pre-Delivery Inspection and record it in the DMS, confirming that fluid levels, tyre pressure, battery charge, electricals and documentation are all in order. Many dealerships configure the system so that invoicing cannot proceed until PDI is marked complete — a control that protects both the customer and the dealership.

4.7 Invoicing, Registration Documents and Delivery

Once PDI is complete, the sales executive raises the final invoice in the DMS, which also prepares the supporting registration/RTO documentation required in the customer's jurisdiction. On the day of delivery, the handover is recorded against the booking, closing the sales lifecycle and updating stock, accounts and CRM simultaneously.

> ***Worked example:*** *A customer books a TVS Raider 125 with an advance of ZMW 2,000. The sales executive records the booking in DMS with the customer's ID and contact number, the branch stock list shows one matching unit, the vehicle is allocated by chassis number, PDI is completed and signed off by the workshop, the balance payment is*

receipted in Accounts, the invoice is generated, and the vehicle is delivered — all five stages visible against the same booking record, so any team member can see the exact status at any time.

4.8 Cancellations and Refunds

If a booking is cancelled before delivery, the DMS provides a formal cancellation workflow that releases the allocated vehicle back to available stock and records the refund of any advance paid, net of any cancellation charge per dealership policy. Cancellations should always be processed through this workflow rather than simply left open, since an un-cancelled booking continues to hold a vehicle out of available stock indefinitely.

4.9 Exchange and Used-Vehicle Handling

Where the dealership runs an exchange programme, the DMS also records the trade-in vehicle's details and valuation, linking it to the new sale so that the exchange bonus or adjustment flows correctly into the final invoice and into used-vehicle stock.

4.10 Sales Targets and Incentive Tracking

Monthly and quarterly sales targets set by TVS and by dealership management are typically loaded into the DMS against each branch and, in many implementations, against each sales executive. Achievement against target is then visible on the Sales dashboard in real time, and feeds the incentive/commission calculations covered further in Chapter 9 (Accounts).

5. Spare Parts and Inventory Management

The Spare Parts module is the operational heart of both the workshop and the parts counter. It governs how parts are ordered from TVS, received into stock, priced, issued against a job card or counter sale, and reported on. Because spare parts inventory ties up significant working capital, this module deserves the same discipline as the accounts function.

5.1 Parts Catalogue and Lookup

Every part is identified by a unique part number, linked in the catalogue to the vehicle models it fits, its description, its dealer price and MRP, and its current stock position across every godown in the branch. Staff should always search by part number where it is known (from a parts manual or a previous job card) rather than by description alone, since many parts share similar descriptions across different model years.

5.2 Purchase Ordering and GRN

Parts are ordered from TVS Motor Company (or an authorised distributor) through a Purchase Order raised in the DMS, typically requiring supervisor approval above a certain value threshold. When the shipment arrives, the store keeper performs Goods Receipt Note (GRN) entry — physically counting and checking the delivery against the purchase order and the supplier invoice before the stock is added to the system. Accurate GRN is the single most important control point in the entire parts process: any shortage, damage or mismatch must be flagged at GRN stage, not discovered weeks later during an audit.

GRN Discrepancy Handling

If the physical delivery does not match the purchase order — short quantity, damaged items, or wrong parts — the discrepancy must be recorded against that specific GRN in the DMS, with supporting notes or photographs, before the shipment is accepted into stock. This creates the documented trail needed to raise a shortage/damage claim with TVS or the carrier.

5.3 Pricing Structure

Price Type	Meaning
Dealer Price (DP)	The price the dealership pays TVS/distributor for the part
MRP	Maximum Retail Price — the ceiling price to the end customer
Margin	The difference between MRP and Dealer Price, the dealership's gross profit on that part

5.4 Stock Classification: ABC and XYZ Analysis

A dealership parts store typically holds thousands of individual part numbers, from high-value engine assemblies to low-value fasteners. Managing all of them with the same level of attention would waste time on cheap, predictable items and under-manage the parts that matter most. The DMS supports classification of stock using two complementary methods:

- ABC Analysis — ranks parts by their annual consumption value. ‘A’ items are the small number of high-value parts that account for the largest share of stock value and need the tightest control. ‘B’ items are

moderate in both value and volume. ‘C’ items are low-value, high-quantity parts (nuts, bolts, small consumables) that can be managed with simpler bin-based reordering.

- XYZ Analysis — ranks parts by how predictable their demand is. ‘X’ items move steadily and are easy to forecast (oil filters, engine oil, brake pads). ‘Y’ items have variable, often seasonal demand. ‘Z’ items are ordered rarely and unpredictably, but a stock-out can be very costly if the part is safety-critical.

Combining the two gives a nine-cell matrix that tells the store keeper exactly how tightly to control each part number — from AX items (steady, high-value, needing precise reorder points) through to CZ items (cheap and rarely used, ordered only on demand).

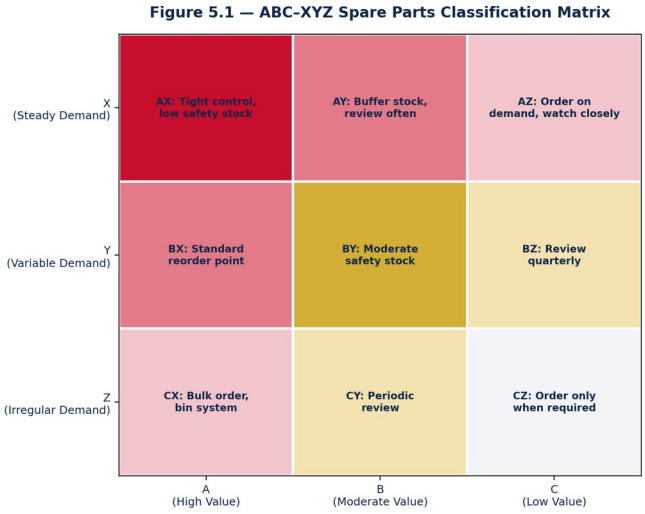

Figure 5.1 — ABC–XYZ classification matrix used to set stocking policy for each spare part.

5.5 Counter Sales and Workshop Issues

Parts leave the store in one of two ways, both recorded in the DMS: a direct counter sale to a walk-in customer, or an issue against an open job card in the workshop, where the part is billed against MRP and linked to manufacturer or goodwill warranty rules as applicable. Every issue reduces the system stock figure in real time, which is what allows the reorder and shortage reports to stay accurate.

5.6 Stock Transfers Between Branches

For a multi-branch dealer such as Zamoto TVS, a part that is out of stock in one branch (say, Solwezi) but available in another (say, Lusaka) can be moved through a formal stock transfer transaction in the DMS, which updates both branches' stock ledgers and keeps the transfer visible for audit rather than being handled as an informal, undocumented favour between store keepers.

5.7 Returns, Slow-Moving Stock and Write-Off

The DMS also tracks parts returns (from customers or from the workshop back to the store) and produces slow-moving and non-moving stock reports. These reports are essential for periodic review meetings, allowing the parts manager to identify obsolete stock for return to TVS (via a Dealer Return Note, or DRN, where TVS policy allows it) or write-off before it silently erodes profitability.

5.8 Cycle Counting

Rather than relying solely on an annual full stock take, disciplined dealerships perform cycle counts — physically counting a small, rotating selection of bin locations every day or week — so that discrepancies are caught and corrected continuously rather than accumulating unnoticed for months.

5.9 Practical Daily Checklist — Spare Parts Counter

11. Match physical stock against the DMS stock ledger for at least one bin location every day (cycle counting).
12. Process GRN entries on the same day goods are physically received.
13. Confirm every part issued to the workshop is linked to a valid, open job card number.
14. Review the reorder / low-stock report before the weekly purchase order is placed.
15. Reconcile the slow-moving stock report at least once a month.

6. The Service / Workshop Module and the Digital Job Card

For a Head Mechanic or workshop team, the Service module is the part of the DMS used most intensively, hour by hour. At its centre is the Job Card — the digital record that follows a vehicle from the moment it enters the workshop to the moment it is billed and handed back to the customer.

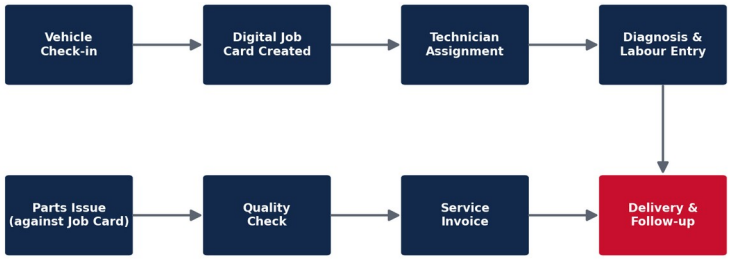

Figure 4.1 — Workshop Job Card Process Flow in DMS

Figure 6.1 — The workshop job card process as it flows through the DMS.

6.1 Service Visit Types

Visit Type	Typical Characteristics
Free Service	Scheduled per the free-service coupon; labour free, parts as required
Paid Service	Standard periodic maintenance; labour and parts billed per price list
Warranty Repair	Manufacturing/material defect within warranty terms; see Chapter 7
Accident / Insurance Repair	Damage repair, often insurance-linked; requires detailed estimate and approval

6.2 Vehicle Check-in

When a vehicle arrives, the service advisor identifies it by chassis number or registration number, which pulls up its full service history, warranty status, and any open recalls or service campaigns directly from the DMS. The customer's complaint or service requirement is recorded in the customer's own words alongside the advisor's technical interpretation.

6.3 Creating the Digital Job Card

A new job card is opened in the system, automatically linked to the vehicle's chassis number and the customer record. The job card records the type of visit, the odometer reading, and the estimated time of completion communicated to the customer. Key fields typically include: job card number (system-generated), date/time in, customer complaint, odometer reading, visit type, assigned technician, and estimated delivery time.

6.4 Technician Assignment and Labour Entry

The service advisor or workshop supervisor assigns the job card to a specific technician or team. As work proceeds, labour operations are selected from the standard Labour Master (see Chapter 3) with the standard time and, where applicable, standard labour charge attached automatically. This standardisation is what makes labour billing consistent and auditable across every technician and every branch.

6.5 Parts Issue Against the Job Card

Any spare part required for the repair is issued from the store directly against the open job card number, as described in Chapter 5. This linkage is what allows the system to calculate the full cost of the job — labour plus parts — automatically, and it is also what is checked when a warranty claim is later raised against the same job card.

6.6 Quality Check and Closure

Before the job card can be closed, a quality check step confirms the reported complaint has actually been resolved. Many dealerships require a supervisor or senior technician to sign off this step in the DMS before the invoice can be generated — a control that protects the dealership's reputation for right-first-time repairs.

6.7 Invoicing and Delivery

The job card converts into a service invoice, itemising labour and parts (or showing them as covered under warranty/free service, as configured for the free-labour model many TVS dealers operate). Once payment is receipted through Accounts, the vehicle is released to the customer, and the closed job card becomes a permanent part of that vehicle's service history for future reference.

> ***Worked example:*** *A customer brings in a TVS King Deluxe three-wheeler reporting a hand-starter fault. The advisor checks the vehicle in DMS by chassis number, opens a job card, assigns it to a technician, the technician diagnoses a worn kick spring, the part is issued against the job card from stock, labour time is logged against the standard 'starter mechanism repair' code, a supervisor completes the quality check, and the invoice reflects the parts cost only (labour free under the current service model) before the vehicle is released.*

6.8 Service Reminders and Scheduling

The DMS also generates automatic service due reminders, calculated from the vehicle's delivery date, last service date, or odometer reading, and can trigger SMS or call-back reminders to the customer. This is the same logic used in dedicated free-service-schedule trackers, and keeping the underlying job card data accurate is what makes those reminders reliable.

6.9 Express Service and Pick-up/Drop

Many dealerships configure a separate express service lane in the DMS for quick, predictable jobs (basic servicing, minor adjustments) with a target turnaround time much shorter than a full workshop job, and some also support pick-up and drop scheduling, recording the pickup address, assigned rider/driver, and return delivery time against the job card.

6.10 Technician Productivity

Because every labour entry is logged against a specific technician with a standard time, the DMS can report actual time taken versus standard time for every job, which is the basis for technician productivity and efficiency reporting used in performance reviews and workshop capacity planning.

7. Warranty Claims Management

Warranty is one of the most tightly controlled processes in the entire DMS, because every claim represents a cost that TVS Motor Company will eventually reimburse to the dealer — provided the claim is correctly documented and approved.

Defect Found During Service
Job Card Marked 'Warranty'
Claim Raised in DMS with Details/Photos
TVS Regional Office Review
Approved / Queried / Rejected
Credit Note to Dealer Account

Figure 8.1 — Warranty Claim Workflow in DMS

Figure 7.1 — The warranty claim workflow, from defect discovery to credit note.

7.1 Warranty Categories

Category	Description
Standard Warranty	Manufacturing/material defects within the standard warranty period and usage limit
Extended Warranty / AMC	Additional coverage purchased by the customer beyond the standard period
Goodwill	Dealer- or TVS-approved coverage outside strict warranty terms, as a customer relations gesture
Recall / Service Campaign	TVS-initiated corrective action on a specific defect across affected vehicles

7.2 Identifying a Warranty Case

During diagnosis on an open job card, the technician determines whether the defect is a manufacturing or material fault covered under TVS's standard warranty terms, or a goodwill case that the dealer wishes to escalate for special consideration. This determination is recorded directly on the job card.

7.3 Raising the Claim

The service advisor raises a warranty claim in the DMS against the job card, attaching the failed part details, defect description, odometer reading, and — increasingly common in modern DMS versions — supporting photographs of the defective part. Precise, honest documentation at this stage is what determines whether the claim is approved smoothly or queried.

Claim Documentation Checklist

16. Job card number and linked parts issue confirmed.
17. Clear defect description in technical terms, not just the customer's words.
18. Odometer reading and delivery date to confirm the vehicle is within warranty terms.

19. Photographs of the failed part, taken before disposal.
20. Failed part retained and tagged with the job card number, pending TVS instruction on disposal or return.

7.4 Regional Office Review and Settlement

The claim is transmitted to the TVS regional or zonal office for review. The reviewing engineer may approve the claim as submitted, query it for further information, or reject it if it falls outside warranty terms. Once approved, the claim value is credited to the dealer's account with TVS, offsetting the free part and labour already provided to the customer. Dealerships should track claim turnaround time (TAT) against the standard TVS commitment, and follow up on any claim that has been pending beyond the expected window.

7.5 Appeals for Rejected Claims

If a claim is rejected and the workshop team believes the rejection was made in error — for example, if additional evidence was not considered — most DMS platforms allow a formal appeal or re-submission with additional supporting documentation, rather than requiring the claim to be abandoned.

7.6 Escalation for Complex or Recurring Faults

For faults that are unusual, recurring across multiple vehicles, or where the standard warranty process does not adequately capture the technical detail, it is good practice to prepare a separate technical fault report — covering the symptom, root cause analysis, and photographic evidence — for direct escalation to TVS's senior technical contacts, in addition to the standard DMS claim. This is exactly the kind of documentation prepared for the kick-spring and hand-starter issues seen on 3-wheeler vehicles.

7.7 Common Reasons Claims Are Rejected or Delayed

- Incomplete or missing defect description, photographs, or part numbers.
- Job card not properly linked to the parts issued for the repair.
- Claim raised outside the vehicle's warranty period or usage limits.
- Failed part not retained for inspection when required by TVS policy.

8. Customer Relationship Management (CRM)

The CRM functions of the DMS tie together everything the dealership knows about a customer — across sales, service, and complaints — into a single view, so that no department is working blind to what another department already knows.

8.1 The Single Customer Record

Every customer is represented once in the DMS master data (see Chapter 3), with all of their vehicle purchases, service visits, and interactions linked to that single record. This avoids the common problem in paper-based dealerships where the same customer is treated as a stranger every time they walk through a different door.

8.2 The Enquiry-to-Loyalty Funnel

Funnel Stage	CRM Activity
Enquiry	Logged with source, model interest, assigned executive
Engagement	Test drive, follow-up calls, price/finance discussion
Conversion	Booking, sale, delivery
Retention	Free/paid service reminders, warranty support
Loyalty / Referral	Satisfaction feedback, referral tracking, repeat purchase

8.3 Service Reminders and Retention

On the service side, CRM tools use the vehicle's service history to trigger free-service, paid-service, and warranty-expiry reminders automatically, which is one of the most effective ways a dealership retains service revenue over the life of a vehicle rather than losing customers to independent garages.

8.4 Complaint and Satisfaction Management

Customer complaints — whether about a vehicle, a repair, or the buying experience — can be logged, assigned to a responsible manager, and tracked to resolution within the DMS, rather than being handled informally and forgotten. Many dealerships also record Customer Satisfaction Index (CSI) feedback captured after a sale or service visit, which feeds into TVS's own dealer performance scoring.

Complaint Escalation Matrix (Typical)

Severity	Response Target	Escalation Point
Minor (service delay, communication gap)	Same day	Branch Service Manager
Moderate (repeat repair, billing dispute)	Within 48 hours	Dealer Admin / Director
Major (safety concern, repeated failure)	Immediate	TVS Regional Office

8.5 Why CRM Discipline Matters

A DMS is only as useful as the discipline behind the data entered into it. A missed enquiry follow-up, an un-logged complaint, or a service reminder never sent are not system failures — they are process failures that the system was specifically built to prevent. Treating CRM entry as a core job responsibility, not an afterthought, is what turns the DMS from a record-keeping tool into a genuine driver of repeat business.

9. Accounts, Finance and GST/VAT Workflows

Every transaction recorded anywhere else in the DMS — a vehicle sale, a service invoice, a parts counter sale, a warranty credit — ultimately lands in the Accounts module, which is why accurate upstream data entry in Sales, Service and Spares is so important: mistakes made there become accounting errors later.

9.1 Receipts and Payments

Cash, bank transfer, mobile money, or financed payments received from customers are recorded as receipts against the relevant invoice (vehicle sale, service invoice, or parts bill). Payments made to suppliers, TVS Motor Company, and staff are recorded as payment vouchers, each linked back to the corresponding purchase order or expense head.

9.2 Daily Cash Book

Every branch maintains a daily cash book within the DMS, recording every cash receipt and payment for the day. At close of business, the system-recorded cash position should be reconciled against the physical cash drawer, with any variance investigated and documented immediately rather than carried forward.

9.3 Ledgers and Reconciliation

The DMS maintains customer ledgers, supplier ledgers, and the dealership's general ledger automatically, updated in real time as transactions are entered elsewhere in the system. Bank reconciliation — matching what the DMS shows against the actual bank statement — should be carried out regularly, since discrepancies caught early are far easier to resolve than discrepancies discovered months later.

9.4 The Dealer–TVS Running Account

Separately from customer-facing accounts, the DMS tracks the dealership's own running account with TVS Motor Company — covering vehicle purchases, parts purchases, warranty credits, and any incentive or subvention claims — giving a real-time picture of what the dealership owes TVS and what TVS owes the dealership at any point in time.

9.5 Tax Compliance (GST/VAT)

Vehicle and parts sales carry the applicable tax (GST in India, VAT in Zambia and many other markets), which the DMS calculates automatically based on the master tax configuration for each item and transaction type. Accurate tax reporting straight from the DMS is far more reliable than reconstructing figures manually at month end, and many dealerships integrate their DMS with external accounting software (such as Tally) specifically to streamline this reporting.

9.6 Financial Reports for Decision-Making

Beyond day-to-day bookkeeping, the Accounts module produces the profit-and-loss and cash-flow visibility that ties directly into the KPI and MIS reporting covered in the next chapter — letting the Dealer Admin and Director see, for example, how service department profitability compares with parts counter profitability in a given month.

10. Reports, MIS and KPI Dashboards

Everything recorded in the DMS — every enquiry, booking, job card, parts issue, and payment — becomes raw material for reporting. This chapter looks at the reports a dealership relies on most, how to read them, and how to build them into a regular management rhythm.

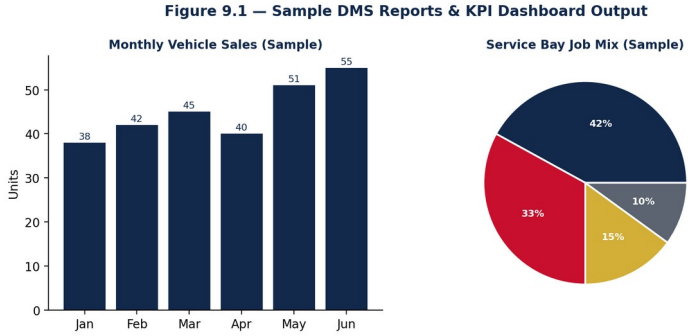

Figure 10.1 — Sample DMS reports and KPI dashboard output (illustrative sample data).

10.1 Sales Reports

- Enquiry-to-booking and booking-to-delivery conversion ratios.
- Model-wise and variant-wise sales performance against monthly targets.
- Sales executive performance leaderboards.
- Lead source effectiveness (which channels convert best).

10.2 Service Reports

- Job cards opened, in-progress, and closed, by technician and by day.
- Free service versus paid service versus warranty job mix.
- Average job completion time against the estimate given to the customer.
- Technician productivity: actual time versus standard time per labour code.

10.3 Spare Parts Reports

- Stock ageing, slow-moving and non-moving items.
- Reorder / low-stock alerts by ABC–XYZ category.
- Parts counter sales versus workshop-issued parts.
- GRN discrepancy log.

10.4 Financial and Branch Comparison Reports

- Branch-wise revenue and profitability (for multi-branch dealers such as Zamoto TVS — Lusaka, Ndola, Solwezi).
- Outstanding receivables and ageing analysis.
- Monthly and year-to-date performance against targets set by TVS and by dealership management.

10.5 Building a Reporting Rhythm

Cadence	Typical Reports Reviewed	Owner
Daily	Open job cards, stock alerts, cash book	Branch Manager / Supervisors
Weekly	Sales conversion, slow-moving stock, technician productivity	Department Managers
Monthly	Full branch-wise financial and KPI performance, target vs achievement	Dealer Admin / Director

10.6 Using Reports in Practice

Reports are only valuable when they lead to action. A well-run dealership reviews key reports on the fixed cadence above and turns findings into specific next steps — for example, a slow-moving stock report leading to a return-to-TVS request, or a low conversion ratio on a specific lead source leading to a change in follow-up approach. This is the same structure used when compiling a strategic business review for TVS management.

11. User Roles, Access Control and Administration

A DMS handling financial transactions, customer data and warranty claims must carefully control who can see and do what. This chapter explains how role-based access works and what the Dealer Admin function is responsible for.

Figure 10.1 — Typical DMS User Roles at Branch Level

Figure 11.1 — Typical DMS user roles and reporting lines at branch level.

11.1 Role-Based Access Control

Every user is created in the system by the Dealer Admin with a specific role, and that role determines exactly which menus, screens, and data the user can access. A Spare Parts store keeper, for example, cannot approve a warranty claim or edit the sales price list; a Sales Executive cannot close a service job card. This separation of duties protects the dealership from both honest mistakes and deliberate misuse.

Sample Access Matrix

Module	Sales	Service	Spares	Accounts	Admin
Bookings & Invoicing	Full	View	—	View	Full
Job Cards	View	Full	View	View	Full
Stock / GRN	—	View	Full	View	Full
Receipts & Ledgers	View	View	View	Full	Full
Master Data	—	—	—	—	Full

11.2 Creating a New User — Step by Step

21. Dealer Admin opens the User Management screen under Utilities/Settings.
22. Enters the new employee's details (linked to their Employee Master record from Chapter 3).
23. Assigns the appropriate role and branch access.
24. Sets a temporary password, which the new user must change at first login.

25. Confirms the access matrix matches the employee's actual job responsibilities before activating the account.

11.3 Deactivating Users

When a staff member leaves or changes role, their account should be deactivated (not merely left dormant) the same day, to close off access immediately while preserving the historical record of transactions they entered while employed — those records must never be deleted, only the active login access removed.

11.4 Audit Trail and Log Review

Every significant action in the DMS — a discount applied, a price changed, a job card reopened after closure — is logged with the user, timestamp, and, in most versions, the before/after values. Dealer Admin should review this audit trail periodically, not only when a problem is suspected, since routine review is what catches small process drift before it becomes a larger issue.

11.5 Multi-Branch Considerations

For a dealer group operating multiple branches — as Zamoto TVS does across Lusaka, Ndola and Solwezi — the DMS allows branch-wise stock, sales and service data to be kept separate for day-to-day operations while still rolling up into consolidated, dealer-group-wide reports for the Director and senior management.

12. Best Practices, Checklists and Common Mistakes

This chapter brings together the practical habits that separate a dealership that merely has a DMS from one that genuinely runs on it.

12.1 Golden Rules for Every DMS User

26. Enter data at the moment the event happens, not at the end of the day from memory.
27. Never share login credentials — every user should have their own account.
28. Treat the job card, not a paper note, as the single source of truth for any vehicle in the workshop.
29. Cross-check figures (stock counts, cash in hand, job card status) against the DMS regularly, not just at month end.
30. Raise warranty claims with complete documentation the first time — incomplete claims cost more time overall than careful ones.

12.2 Opening-of-Day Checklist

- Confirm login and branch selection are correct for the day's shift.
- Review overnight or pending job cards and assign technicians.
- Check the low-stock / reorder alert list before the parts counter opens.
- Review the day's scheduled deliveries and service appointments.

12.3 Close-of-Day Checklist

- Ensure every job card touched that day is updated to its correct status (open, in-progress, QC, closed).
- Reconcile cash and receipts recorded in Accounts against the physical cash drawer.
- Confirm all parts issued during the day are linked to a job card or counter sale, with no unexplained stock movement.
- Log out of shared terminals.

12.4 Weekly Checklist

- Review and place the parts reorder based on the low-stock report.
- Review open enquiries and bookings older than seven days without a logged follow-up.
- Check outstanding warranty claims for any pending TVS response beyond the expected TAT.

12.5 Monthly Checklist

- Reconcile the slow-moving stock report and action any obsolete items.
- Review branch-wise KPI performance against target with department heads.
- Complete bank reconciliation and review the dealer–TVS running account balance.

12.6 Common Mistakes and How to Avoid Them

Common Mistake	Better Practice
Batching data entry at week's end from memory	Enter each transaction as it happens

Common Mistake	Better Practice
Issuing parts before a job card is opened	Always open the job card first, then issue against it
Sharing one login across a shift	Every technician/advisor logs in individually
Raising warranty claims with vague descriptions	Capture defect detail and photos at the point of diagnosis
Ignoring slow-moving stock reports	Review and act on them monthly, not only during audits
Creating a new customer record without searching first	Always search the Customer Master before adding a new record
Leaving cancelled bookings open in the system	Process cancellations formally to release allocated stock

13. Frequently Asked Questions

This chapter collects the questions new DMS users ask most often during induction training, with practical answers.

Q: What do I do if the DMS is completely inaccessible (system down)?

A: Follow your dealership's documented manual fallback procedure (paper job card / sales register), and enter every transaction into the DMS retrospectively, in the correct sequence, as soon as access is restored. Never skip retrospective entry, since downstream reports depend on it.

Q: Can I edit a job card after it has been closed and invoiced?

A: Generally no — closed, invoiced job cards are locked to protect the financial and warranty record. If a genuine correction is needed, it is handled through a formal reversal/adjustment process by Dealer Admin, not a direct edit.

Q: What happens if I allocate the wrong vehicle to a booking?

A: Reverse the allocation before invoicing (if the system allows) and re-allocate the correct chassis number. If the vehicle has already been invoiced, this becomes a formal correction handled by Dealer Admin, since it affects both stock and customer registration records.

Q: Why can't I see the Master Data menu?

A: Master Data access is normally restricted to Dealer Admin and senior roles by design, to protect the accuracy of information every other module depends on. If you believe you need access for your role, request it from your Dealer Admin.

Q: A part shows in stock in the DMS but is not physically on the shelf — what do I do?

A: Do not issue the part against a job card until the discrepancy is resolved. Report it immediately for a cycle count / investigation, since issuing against phantom stock will simply move the discrepancy downstream into a shortage the next customer encounters.

Q: How long does a warranty claim usually take to settle?

A: This varies by claim complexity and region, but every dealership should track claims against the TVS-published turnaround expectation and follow up proactively on anything pending beyond that window rather than waiting indefinitely.

Q: Can two branches share one DMS login?

A: No. Each user, at each branch, should have their own individual login, even if the same person occasionally works across branches — in that case, they are given multi-branch access on their single account rather than a second shared login.

14. Troubleshooting Common DMS Issues

Most day-to-day DMS problems fall into a small number of recurring categories. This chapter provides a first-response guide before escalating to Dealer Admin or TVS technical support.

14.1 Performance and Connectivity Issues

Symptom	First Response
Screens loading slowly	Check local internet connection; close unused browser tabs/applications
Transaction fails to save	Do not repeat the action immediately — confirm whether it actually saved before re-entering, to avoid duplicates
System times out mid-entry	Save work in smaller steps where the screen allows; report repeated timeouts to Dealer Admin

14.2 Data Discrepancy Issues

Symptom	First Response
Stock figure doesn't match physical count	Do not adjust stock manually without investigation; log a cycle count discrepancy for review
Duplicate customer records found	Report to Dealer Admin for a formal merge rather than manually re-entering history
Invoice total doesn't match expected price	Verify the Price List and Tax Master figures before assuming a system error

14.3 Workflow / Process Issues

Symptom	First Response
Cannot close a job card	Check for pending parts issues, unresolved QC step, or an unlinked labour entry
Cannot invoice a vehicle sale	Confirm PDI has been marked complete and allocation is finalised
Warranty claim rejected	Review the documentation checklist in Chapter 7 and consider a formal appeal with additional evidence

14.4 When to Escalate to TVS Technical Support

Escalate beyond the Dealer Admin to TVS regional technical support when an issue affects multiple users or branches simultaneously, persists after a normal restart/re-login, or appears to be a system-wide fault rather than a local data or process issue. Always note the exact error message, the screen involved, and the time it occurred before raising the escalation, since this detail significantly speeds up resolution.

15. Appendix A — Sample Form Field Reference

This appendix provides a quick-reference field list for the three documents staff complete most often. Exact field names may vary slightly by DMS version, but the underlying information required is consistent.

A.1 Job Card — Core Fields

Field	Example / Notes
Job Card No.	System-generated, unique
Date / Time In	Auto-captured at check-in
Chassis / Engine No.	Confirmed against vehicle master
Customer Complaint	In customer's own words
Odometer Reading	Recorded at check-in
Visit Type	Free / Paid / Warranty / Accident
Assigned Technician	From Employee Master
Labour Codes Used	From Labour Master, with time logged
Parts Issued	Linked part numbers and quantities
QC Sign-off	Supervisor confirmation before closure
Estimated / Actual Delivery Time	Communicated to customer at check-in

A.2 Sales Invoice — Core Fields

Field	Example / Notes
Booking No.	Links to the original booking record
Customer Details	From Customer Master
Model / Variant / Colour	From Vehicle Model Master
Chassis / Engine No.	Allocated unit
Price Breakup	Ex-showroom, tax, registration, insurance, accessories
Financing Details	Financier name, loan amount, if applicable
PDI Confirmation	Required before invoice can be finalised
Payment Received	Cash / bank / mobile money / finance disbursement

A.3 Warranty Claim — Core Fields

Field	Example / Notes
Job Card No.	Links the claim to the original repair

Field	Example / Notes
Failed Part No.	From parts catalogue
Defect Description	Technical description of the fault
Odometer / Delivery Date	To confirm warranty eligibility
Supporting Photographs	Of the failed part, before disposal
Claim Status	Raised / Queried / Approved / Rejected

16. Glossary of Key Terms

A quick-reference glossary of the abbreviations and terms used throughout this handbook and across the TVS DMS.

Term	Meaning
DMS	Dealer Management System — the software platform covering all dealership operations.
GRN	Goods Receipt Note — the record created when purchased stock is physically received and checked in.
DRN	Dealer Return Note — the record created when stock is formally returned to TVS.
PDI	Pre-Delivery Inspection — the final vehicle check completed before a sale is invoiced.
Job Card	The digital record that tracks a vehicle through the workshop from check-in to delivery.
ABC Analysis	Classification of inventory items by their value contribution (A = highest value).
XYZ Analysis	Classification of inventory items by how predictable their demand is (X = most predictable).
MRP	Maximum Retail Price — the ceiling price at which a part or product may be sold.
Dealer Price (DP)	The price the dealership pays TVS/distributor for a part.
RTO	Regional Transport Office (or equivalent vehicle registration authority).
CRM	Customer Relationship Management — tools for tracking enquiries, follow-ups and complaints.
CSI	Customer Satisfaction Index — a score reflecting customer feedback on sales/service experience.
KPI	Key Performance Indicator — a measurable value used to track business performance.
MIS	Management Information System — the reporting layer that turns transaction data into decision-ready summaries.
Allocation	Matching a specific physical vehicle (by chassis number) to a confirmed customer booking.
TAT	Turnaround Time — the expected duration to complete a process, such as a warranty claim.
Goodwill Warranty	A repair covered by the dealer/manufacturer outside the strict terms of standard warranty, as a customer relations gesture.
Ledger	A running record of all financial transactions for a specific customer, supplier, or account.
Slow-Moving Stock	Inventory items with little or no consumption over an extended period, tying up working capital.
Cycle Count	A partial, rotating physical stock count used to verify accuracy continuously rather than only annually.
Master Data	The foundational reference data (models, prices, customers, tax rates) that all

Term	Meaning
	transactions depend on.
NBFC	Non-Banking Financial Company — a common vehicle financing partner in markets like India.

17. Closing Notes

The TVS Dealer Management System is, at its core, a tool for discipline: it turns the many small, everyday actions of a dealership — an enquiry logged, a part issued, a job card closed, a payment receipted — into a single, trustworthy record that the whole team, and TVS Motor Company itself, can rely on.

No handbook can replace hands-on practice on the live system, and no two dealerships configure every screen identically. What this book aims to give you instead is the underlying logic of each module — why each step exists and what it protects against — so that whatever exact screen you are looking at, you understand what it is really asking of you and why it matters.

New team members are encouraged to work through this handbook chapter by chapter alongside supervised practice on the live DMS, and experienced staff are encouraged to keep it as a reference for the less frequent workflows, such as warranty escalation or multi-branch reporting, that do not come up every day.

— End of Handbook —

Compiled by श्री. योगेश मिरजकर

PART II

Master Data

This part goes in depth on the reference data every transaction in the DMS depends on: the Vehicle Model, Model–Part Mapping, Spare Part, Part Cost, Part Price, Labour, Labour Price, Customer, Employee, Area and Care Camp Scheme masters, how they connect, and how to govern them.

Chapters in this part:

- Introduction: Why Master Data Matters
- Vehicle Model Master
- Model–Part Mapping Master
- Spare Part Master
- Part Cost Master
- Part Price Master
- Labour Master
- Labour Price Master
- Customer Master
- Employee Master
- Area Master
- Care Camp Scheme Master
- How the Masters Work Together — A Complete Worked Example
- Master Data Governance and Best Practices
- Glossary of Key Terms
- Closing Notes

1. Introduction: Why Master Data Matters

Every screen you use in the TVS DMS — a sales booking, a job card, a parts counter bill, a warranty claim — is really just a form that pulls information from a small number of underlying reference tables and then records a new transaction against them. Those reference tables are called Master Data, and they are the single most important foundation of the entire system. Get them right once, and every transaction built on top of them is fast, accurate and consistent. Get them wrong, and the same mistake repeats silently across hundreds of transactions before anyone notices.

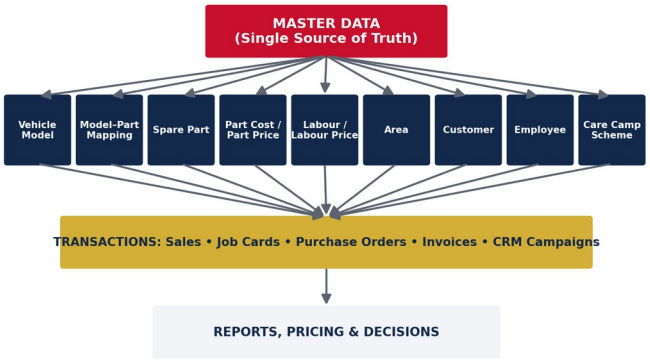

Figure 1.1 — The Master Data Ecosystem: every transaction depends on accurate masters

Figure 1.1 — The Master Data ecosystem: every transaction depends on accurate masters, and every master feeds directly into reports and pricing decisions.

1.1 What Counts as Master Data

In the TVS DMS, Master Data covers any information that is set up once and then reused repeatedly, rather than being typed fresh on every transaction. This handbook covers nine such masters in dedicated chapters:

Master	What It Defines
Vehicle Model Master	Every model/variant the dealership sells and its specifications
Model–Part Mapping	Which spare parts belong to which vehicle model
Spare Part Master	Every individual part number, its description and attributes
Part Cost	What the dealership pays TVS/distributor for each part
Part Price	What the dealership charges the customer for each part
Labour Master	Every standard repair/service operation and its standard time
Labour Price	The rate charged per labour operation or per hour
Customer Master	Every individual or company the dealership has sold to or served
Employee Master	Every staff member, their role, and their branch
Area Master	The geographic hierarchy used for territory and camp planning
Care Camp Scheme	Outreach service camps and the offers/schemes run during them

1.2 Why Master Data Is Restricted Access

Unlike day-to-day transactions, which many staff enter throughout the day, Master Data is deliberately restricted to Dealer Admin and a small number of senior users. This is not bureaucracy for its own sake: a single incorrect entry in a master — a wrong part price, a wrong labour standard time, a duplicated customer — does not stay a single error. It propagates into every transaction that references it, from that moment until someone notices and corrects it at the source.

> ***Why this matters:*** *A transaction-level mistake affects one invoice. A master-data mistake affects every invoice built on that master until it is fixed. This is why master data changes deserve more caution, not less, than everyday transactions.*

1.3 The Golden Rule: Create Once, Reuse Always

Across every master covered in this book, one habit matters more than any other: before creating a new record, search for the existing one. Whether it is a customer, a part number, or a vehicle model, duplicate master records are the single most common and most damaging data quality problem in any dealership DMS. A five-second search habit, practised consistently, prevents hours of reconciliation work and permanently fragmented history later.

1.4 How This Book Is Organised

Chapters 2 through 10 take each master in turn — what it is, the key fields it holds, how it is used day to day, and the practical impact of getting it right or wrong. Chapter 11 shows how all nine masters interconnect as a single working system, using a worked example that touches every one of them. Chapter 12 sets out the governance discipline — who should be allowed to edit what, and how changes should be reviewed — that keeps master data trustworthy over the long run.

2. Vehicle Model Master

The Vehicle Model Master is the starting point for the entire Sales side of the DMS, and it is also the anchor that the Model–Part Mapping master (Chapter 3) depends on. Every vehicle the dealership is authorised to sell must exist here, correctly and completely, before a single unit can be booked.

2.1 Purpose

This master holds the definitive list of every model and variant TVS has authorised the dealership to sell, along with the specifications, colour options and base pricing that every sales booking, allocation and invoice will pull from. It is also the reference point that service technicians use to confirm exactly which vehicle they are working on, and that the Model–Part Mapping master uses to determine which parts are valid for that vehicle.

2.2 Key Fields

Field	Description
Model Code	Unique internal code identifying the model/variant combination
Model Name	Marketing name shown to customers (e.g. TVS Raider 125)
Variant	Specific trim level (e.g. Standard, Disc, Drum)
Engine Capacity	Displacement in cc, used for tax and insurance calculation
Colour Options	The list of colours currently offered for this variant
Ex-Showroom Price	Base price before tax, registration and accessories
Standard Accessory List	Accessories fitted as standard for this variant
Launch / Discontinuation Date	Controls whether the model is currently sellable

2.3 Who Maintains It and How

TVS Motor Company pushes model master updates centrally whenever a new model launches, a variant is added, or a factory price change takes effect — this part of the master is generally read-only at dealer level. Dealer-level fields, such as local on-road price components specific to the branch's registration authority, remain the responsibility of the Dealer Admin, who should update them immediately whenever local government fees or taxes change, rather than waiting for a customer complaint about an incorrect on-road price.

2.4 Everyday Impact

- A sales booking cannot be created for a model that does not exist, or that has been marked discontinued, in this master.
- The Model–Part Mapping master, covered next, cannot function correctly unless the model record it references is accurate.
- Vehicle allocation (matching a physical chassis to a booking) checks the chassis's model code against this master to prevent mismatched allocations.
- Warranty terms and free-service schedules are frequently configured per model, so an incorrect model record can silently misapply warranty coverage.

2.5 Common Errors and Their Consequences

Error	Downstream Consequence
Colour option missing from list	Sales executive cannot book the customer's chosen colour
Ex-showroom price not updated after a TVS price revision	Incorrect invoices, requiring correction and possible customer dispute
Discontinued model not marked as such	Bookings can still be raised for a vehicle no longer in production
Engine capacity entered incorrectly	Wrong tax/registration calculation on every invoice for that model

3. Model–Part Mapping Master

Model–Part Mapping is one of the most operationally important masters in the entire spare parts function, yet it is also one of the least visible — most staff never open this screen directly, but they rely on it every single time they search for a part against a vehicle.

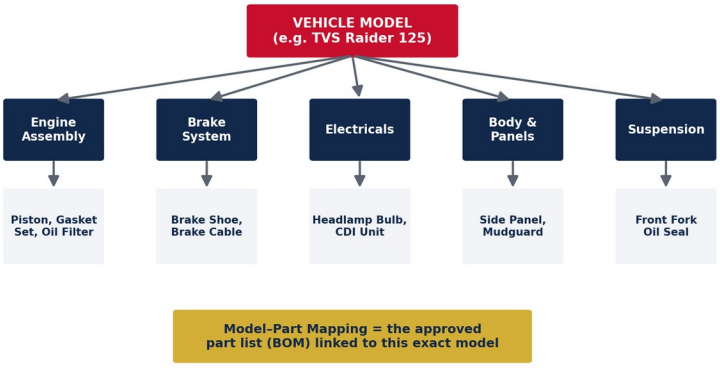

Figure 3.1 — How Model-Part Mapping links a vehicle model to its correct parts

Figure 3.1 — How Model–Part Mapping links a vehicle model to its correct, approved list of parts.

3.1 Purpose

This master defines, for every vehicle model in the Vehicle Model Master, exactly which spare parts are approved to fit it — in effect, a Bill of Materials (BOM) for each model. When a technician looks up parts for a specific chassis number, the DMS uses this mapping to filter the entire spare parts catalogue down to only the parts that are genuinely compatible with that vehicle, rather than showing every part the dealership stocks.

3.2 Key Fields

Field	Description
Model Code	Links to the Vehicle Model Master
Part Number	Links to the Spare Part Master
Applicable From / To	Chassis or date range for which this mapping applies (for mid-life running changes)
Quantity per Vehicle	How many units of this part exist per vehicle (e.g. 2 brake shoes)
Critical / Safety Flag	Marks parts where substitution or delay is not acceptable (e.g. brake components)

3.3 Why This Master Exists Separately from the Parts Catalogue

It might seem simpler to let staff search the entire spare parts catalogue directly rather than maintaining a separate mapping. In practice, most models share large numbers of common parts (fasteners, general electricals) while a smaller number of parts are model-specific or even variant-specific (body panels, certain engine

components). Without a mapping, a technician has no reliable way to know whether a part that looks similar in the catalogue is genuinely correct for the vehicle in front of them — a mistake that can mean an incorrect part is fitted, or a part that should have been available is missed entirely.

3.4 Handling Running Changes

Vehicle manufacturers periodically make running changes — minor specification updates mid-production without a full model change (for example, a supplier change for a bracket, or an updated CDI unit). The Applicable From/To fields allow the mapping to reflect this accurately, so that a technician working on an early-production unit and one working on a later-production unit of the nominally same model are both shown the correct part for their specific vehicle.

3.5 Everyday Impact

- Parts counter staff and technicians search by chassis number and see only genuinely compatible parts, dramatically reducing wrong-part fitment.
- Purchase planning uses this mapping, combined with the dealership's vehicle sales mix, to forecast which parts are likely to be needed in the coming months.
- Warranty claims reference this mapping to confirm the part claimed against a job card is genuinely valid for that chassis.

> ***Worked example:*** *A technician searches for a headlamp bulb against a customer's TVS Apache RTR 160. Because Model–Part Mapping links this exact model and its production date range to the correct bulb part number, the technician is shown one unambiguous, correct result rather than needing to manually cross-check a paper parts manual or guess between several visually similar bulbs used across different TVS models.*

3.6 Common Errors and Their Consequences

Error	Downstream Consequence
New model launched without mapping set up	Technicians cannot reliably find correct parts for it
Running change not reflected in Applicable From/To	Wrong part suggested for vehicles built after the change
Critical/Safety flag missing on a brake or steering part	Reduced visibility of safety-critical stock-outs in reports

4. Spare Part Master

Where Model–Part Mapping tells you which parts belong to which vehicle, the Spare Part Master is where each individual part itself is defined — its identity, description, and physical attributes, independent of any particular vehicle.

4.1 Purpose

Every part the dealership might ever stock or sell — whether fast-moving consumables like oil filters or rare model-specific components — exists exactly once in this master, identified by a unique part number. This is the record that the parts catalogue, GRN, counter sales, job card parts issue, and every stock report ultimately point back to.

4.2 Key Fields

Field	Description
Part Number	Unique identifier, as printed in the TVS parts catalogue
Description	Standard part name/description
Unit of Measure	Each, litre, metre, kilogram, and so on
Category / Group	Broad classification (engine, electrical, body, consumable)
ABC / XYZ Classification	Stocking policy classification, covered in the main handbook
Supersession Reference	If this part number has been replaced by a newer one, or replaces an older one
Shelf Life (if applicable)	For rubber, adhesive or chemical items with a limited shelf life

4.3 Part Supersession

Manufacturers periodically discontinue a part number and replace it with an updated one — sometimes because of a design improvement, sometimes simply a packaging or supplier change. The Supersession Reference field allows the Spare Part Master to record this relationship, so that a technician or store keeper searching for an old, discontinued part number is automatically directed to its correct current replacement, rather than being told the part does not exist.

4.4 Search and Identification Discipline

Because many parts share similar or overlapping descriptions across different systems and models, staff should always search and confirm by part number, cross-checked against the parts catalogue or Model–Part Mapping result, rather than relying on description text alone. This is especially important for small, visually similar components such as bulbs, bearings, and fasteners, where a description-only search can easily return the wrong result.

4.5 Everyday Impact

- GRN entries, counter sales, and job card parts issues are only as accurate as the underlying part record they reference.

- Stock reports, reorder alerts, and slow-moving stock analysis are all built from this master, alongside the transaction history.
- Correct categorisation feeds directly into the ABC–XYZ stocking policy work covered in the main DMS handbook.

4.6 Common Errors and Their Consequences

Error	Downstream Consequence
Duplicate part records for the same physical part	Stock and sales history split across two records, hiding true demand
Supersession not recorded when a part is replaced	Staff wrongly told a discontinued part is unavailable, or order the wrong one
Wrong unit of measure (e.g. 'each' instead of 'litre')	Incorrect stock quantities and incorrect pricing calculations

5. Part Cost Master

Part Cost is the financial twin of the Spare Part Master: while the Spare Part Master defines what a part is, Part Cost defines what it costs the dealership to acquire it. Getting this master right is essential to knowing whether the parts business is actually profitable, not just busy.

5.1 Purpose

This master records the Dealer Price (DP) — the amount TVS Motor Company or an authorised distributor charges the dealership for each part — along with any freight, duty, or handling cost that should be attributed to landing that part in the dealership's store. It is the cost baseline against which Part Price (Chapter 6) and margin are calculated.

5.2 Key Fields

Field	Description
Part Number	Links to the Spare Part Master
Dealer Price (DP)	Base cost charged by TVS/distributor per unit
Landed Cost Additions	Freight, import duty, or handling cost, where tracked separately
Effective Date	Date from which this cost applies, since TVS revises prices periodically
Currency	Relevant for dealers, such as Zamoto TVS, operating outside India

5.3 Cost Revisions Over Time

TVS periodically revises Dealer Prices, and the Part Cost master should always reflect the current, effective cost rather than a historical one — while still preserving the history of past costs for margin analysis on older transactions. Most DMS platforms handle this through an effective-date mechanism, so that a GRN processed last month correctly reflects last month's cost, while today's GRN reflects today's cost, without manual recalculation.

5.4 Everyday Impact

- Every GRN entry values incoming stock using the Part Cost master, which is what makes stock valuation reports accurate.
- Margin and profitability reports (parts department profitability, in particular) depend entirely on Part Cost being current and correct.
- Part Price, covered next, is normally derived from Part Cost plus a margin policy — an error in cost flows directly into an error in the customer-facing price.

5.5 Common Errors and Their Consequences

Error	Downstream Consequence
Dealer Price not updated after a TVS revision	Understated or overstated margin reporting; potential underpricing to customers
Landed cost additions ignored	Parts appear more profitable on paper than they actually are

Error	Downstream Consequence
Currency/exchange rate not maintained for export markets	Incorrect cost basis for dealers outside India

6. Part Price Master

Part Price is what the customer actually pays. Where Part Cost is an internal figure, Part Price is customer-facing, and it is what appears on every counter sale and every job card parts line.

Figure 5.1 / 7.1 — How Part Price and Labour Price are built up in the DMS
Spare Parts: Cost → Price
Labour: Time → Price
Part Cost (Dealer Price from TVS)
+ Dealer Margin
= Part Price (MRP to Customer)
Labour Master (Standard Time per operation)
× Labour Rate/hour
= Labour Price (charged on job card)

Figure 6.1 / 8.1 — How Part Price and Labour Price are built up from cost and standard time respectively.

6.1 Purpose

This master defines the Maximum Retail Price (MRP), or the dealership's selling price where MRP does not strictly apply, for every spare part. It is what every invoice, whether a counter sale or a job-card parts line, references directly — no sales or service staff should ever need to manually calculate or type a part's selling price.

6.2 Key Fields

Field	Description
Part Number	Links to the Spare Part Master
MRP	Maximum Retail Price, or dealer selling price where MRP does not apply
Margin (Derived)	MRP minus Part Cost, usually calculated automatically for reporting
Discount Policy	Any standard discount permitted, and the approval level required above it
Effective Date	Date from which this price applies

6.3 Margin as a Management Tool

Because Part Price and Part Cost are both held in the DMS, the margin on every single part — and on every parts sale — is calculable in real time, without any manual spreadsheet work. This is one of the more powerful, if under-used, capabilities of the system: a parts manager can identify which categories of parts are genuinely profitable and which are being sold too close to cost, and adjust purchasing or pricing policy accordingly.

6.4 Discount Control

Most dealerships allow a small standard discount at counter-staff level (for example, on accessories) but require supervisor or manager approval for anything beyond it. The DMS enforces this through the Discount Policy field, which is far more reliable than relying on staff memory of an informal, unwritten discount rule.

6.5 Everyday Impact

- Every counter sale and job card parts line pulls its price directly and automatically from this master.
- Consistent, system-driven pricing means a customer is charged the same price for the same part regardless of which staff member or which branch serves them.
- Margin reporting, and therefore parts department profitability reporting, depends entirely on this master being kept current alongside Part Cost.

6.6 Common Errors and Their Consequences

Error	Downstream Consequence
Price not updated after a cost increase	Margin silently erodes on every sale of that part
Inconsistent pricing between branches without deliberate policy	Customer complaints when comparing prices across a multi-branch dealer
Discount policy not enforced in the system	Inconsistent, undocumented discounting by individual staff

7. Labour Master

Just as the Spare Part Master standardises what a part is, the Labour Master standardises what a repair or service operation is — giving every technician, every service advisor, and every branch a common, agreed definition of each job.

7.1 Purpose

The Labour Master lists every standard repair or maintenance operation the workshop performs — from a simple engine oil change to a complete clutch overhaul — each identified by a labour code, with a clear description and a standard time. This is what allows a job card to be billed consistently, regardless of which technician performed the work or which branch the vehicle was serviced at.

7.2 Key Fields

Field	Description
Labour Code	Unique identifier for the operation
Description	Standard name of the operation (e.g. 'Front brake shoe replacement')
Applicable Models	Which vehicle models this operation code applies to
Standard Time	Expected time to complete the operation under normal conditions
Skill Level Required	Basic, intermediate, or advanced technician skill needed
Warranty Eligibility	Whether this operation can be billed as free/warranty labour

7.3 Standard Time as a Management Tool

Standard Time exists for two connected reasons: it gives the customer an honest, consistent estimate of how long a job should take, and it gives workshop management a benchmark against which actual technician performance can be measured. A technician who consistently completes jobs well within standard time is likely highly proficient (or, occasionally, cutting corners worth investigating); one who consistently exceeds standard time may need additional training or support.

7.4 Everyday Impact

- Job cards select labour operations from this master rather than technicians describing work freely, which is what makes labour billing predictable and auditable.
- Estimated delivery times quoted to customers at check-in are built from the standard times of the operations expected on that job card.
- Technician productivity reporting (actual time versus standard time) depends entirely on labour entries being correctly coded against this master.

7.5 Common Errors and Their Consequences

Error	Downstream Consequence
New repair type not added to Labour Master	Technician records it as a miscellaneous entry, losing

Error	Downstream Consequence
	standardisation and reporting value
Standard time set unrealistically low	Customers repeatedly given delivery estimates the workshop cannot meet
Warranty eligibility flag incorrect	Warranty claims rejected, or free labour wrongly billed to the customer

8. Labour Price Master

Labour Price turns the Labour Master's standard time into an actual amount charged to the customer (where labour is chargeable) or recorded for internal costing (where labour is provided free under a service scheme).

8.1 Purpose

This master holds the rate — typically per hour or per standard labour code — used to calculate the labour charge on a job card. It works together with the Labour Master's standard time: multiply standard time by the labour rate, and the system arrives at a consistent labour charge without any manual calculation by the service advisor.

8.2 Key Fields

Field	Description
Labour Code	Links to the Labour Master
Rate per Hour / per Operation	The chargeable rate applied to standard time
Visit Type Applicability	Whether this rate applies to paid service, warranty, or accident repair jobs
Effective Date	Date from which this rate applies

8.3 Free-Labour Service Models

Many TVS dealerships, including those operating a free-labour policy for scheduled services, still maintain Labour Price internally even when the customer is not charged — because the internal cost of labour still needs to be tracked for true job costing and for the labour-cost component of any warranty claim submitted to TVS. Free to the customer does not mean free to record.

8.4 Everyday Impact

- Every chargeable job card calculates its labour total automatically from this master, removing the need for advisors to manually price labour.
- Warranty claims reference the internal labour rate to calculate the labour component TVS will reimburse, even where the customer was not charged.
- Workshop profitability reporting depends on labour being costed accurately here, not estimated after the fact.

8.5 Common Errors and Their Consequences

Error	Downstream Consequence
Rate not revised in line with rising operating costs	Workshop labour revenue understates true cost of running the bay
Visit-type applicability misconfigured	Warranty labour mistakenly charged to the customer, or vice versa

9. Customer Master

The Customer Master is the record that ties every part of the dealership's relationship with a person or company together — every vehicle they have bought, every service visit, every complaint, and every enquiry, all in one place. It is also, in most dealerships, the master most frequently duplicated by mistake, so this chapter pays particular attention to prevention.

9.1 Purpose

Every individual customer or corporate/fleet account should exist exactly once in this master. Sales bookings, job cards, warranty claims, and CRM follow-up all link back to this single record, which is what allows the dealership to see a customer's complete history regardless of which department or branch is looking.

9.2 Key Fields

Field	Description
Customer ID	System-generated unique identifier
Full Name	Individual or registered company name
Contact Number(s)	Primary and, where available, secondary contact numbers
ID / Registration Document	National ID, passport, or company registration number
Address	Physical address, linked where possible to the Area Master (Chapter 11)
Vehicles Owned	Linked chassis numbers for every vehicle purchased or serviced
Preferred Branch	The branch the customer most commonly visits
Communication Preference	SMS, call, or app notification preference for reminders

9.3 Preventing Duplicate Customers

Duplicate customer records are created almost every time staff skip the search step and create a new record directly. The discipline required is simple and non-negotiable: search by mobile number first (the most reliable unique identifier in most markets), then by name and ID document, before ever clicking 'New Customer'. If a customer's contact number has genuinely changed, the correct action is to update the existing record, not create a new one.

> ***Important:*** *If two records for the same customer are ever discovered, do not attempt to fix this yourself by re-entering history. Report both Customer ID numbers to the Dealer Admin for a formal merge, which preserves the complete transaction history under a single record.*

9.4 Individual vs. Corporate/Fleet Customers

Corporate and fleet customers (a company purchasing or servicing multiple vehicles) are typically set up with a company-level Customer Master record, with individual drivers or vehicles linked underneath it, so that invoicing and communication happen at the correct level (usually the company) while service history remains trackable per vehicle.

9.5 Everyday Impact

- Sales and service staff can instantly see a customer's full history the moment they search by mobile number or chassis number.
- CRM follow-up, service reminders, and warranty communication all rely on accurate, current contact details held here.
- Customer Satisfaction Index (CSI) and loyalty reporting are only meaningful if each customer's activity is correctly consolidated under one record.

9.6 Common Errors and Their Consequences

Error	Downstream Consequence
Duplicate record created instead of searching first	Service history and reminders split across two records
Contact number not updated when a customer changes it	Missed service reminders and failed follow-up calls
Vehicle not linked to the correct customer record	Warranty and service history appears incomplete at the next visit

10. Employee Master

The Employee Master is the bridge between a real person on the dealership floor and their DMS user login, role, and branch assignment. It also underpins every productivity and performance report covered in the main handbook.

10.1 Purpose

Every staff member with DMS access — sales executives, technicians, service advisors, store keepers, accounts staff — has a record here, linking their personal and employment details to their system role and branch. This is what allows the system to attribute every transaction (a booking, a labour entry, a GRN) to a specific, accountable person.

10.2 Key Fields

Field	Description
Employee ID	Unique internal identifier, distinct from the DMS login username
Full Name	As per employment records
Designation	Job title (e.g. Service Advisor, Technician, Store Keeper)
Branch	Primary branch of employment
Skill Level / Certification	Relevant for technicians, used in job assignment and standard time comparisons
Date of Joining / Leaving	Used to activate and deactivate system access at the correct time
Linked DMS User Login	Connects this employee record to their actual system account and role

10.3 The Link Between Employee Master and User Access

The Employee Master and the DMS user account are related but distinct: the Employee Master describes the person and their job, while the user account (covered in the main handbook's chapter on Roles and Access Control) describes what they are permitted to do in the system. A new employee should always have their Employee Master record created first, and their user login created and linked to it second — never the reverse, and never a shared login across two employees.

10.4 Everyday Impact

- Every labour entry, sales booking, and stock transaction is attributed to the correct employee for productivity and accountability reporting.
- Technician skill level, held here, is used by some DMS configurations to guide which jobs can be assigned to whom.
- Leaver management (deactivating access the same day an employee leaves) depends on this master being updated promptly.

10.5 Common Errors and Their Consequences

Error	Downstream Consequence
Employee record not deactivated promptly after leaving	Security risk; former staff retain system access
Skill level not updated after training/certification	Jobs assigned that do not match a technician's actual current capability
Branch field incorrect for a transferred employee	Productivity and performance reports attributed to the wrong branch

11. Area Master

The Area Master is the geographic backbone behind territory planning, customer address standardisation, and — as covered in the next chapter — the planning of outreach service camps.

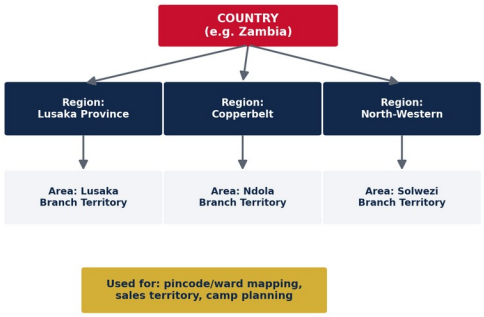

Figure 6.1 — Typical Area Master hierarchy: Country → Region → Area → Branch Territory

Figure 11.1 — A typical Area Master hierarchy: Country → Region → Area → Branch Territory.

11.1 Purpose

This master defines the geographic hierarchy the dealership operates within — typically structured from country down through region, area, and finally the specific territory served by each branch. For a multi-branch dealer group such as Zamoto TVS, this hierarchy is what allows Lusaka, Ndola and Solwezi to each have clearly defined, non-overlapping territories, while still rolling up into consolidated regional and national reporting.

11.2 Key Fields

Field	Description
Area Code	Unique identifier for the geographic area
Area Name	Descriptive name (e.g. 'Lusaka Central', 'Copperbelt North')
Parent Region	The broader region this area belongs to
Assigned Branch	Which branch is responsible for sales and service in this area
Pincode / Ward Mapping	Local postal or administrative codes falling within this area

11.3 Everyday Impact

- Customer addresses can be standardised and mapped to the correct area, which improves the accuracy of territory and market-penetration reporting.
- Sales territory assignment for executives is often built on top of this master, so leads are routed to the right person for that geography.
- Care Camp Scheme planning, covered next, uses the Area Master to decide where an outreach camp will have the greatest reach and impact.

11.4 Common Errors and Their Consequences

Error	Downstream Consequence
Area boundaries not updated as the dealership's territory grows	Leads and customers mis-assigned to the wrong branch or executive
Pincode/ward mapping incomplete	Customer addresses cannot be reliably classified for reporting or camp planning

12. Care Camp Scheme Master

Care Camp Scheme covers the outreach service camps many TVS dealerships run beyond the physical showroom and workshop — typically in rural or under-served areas within the dealership's territory — offering free vehicle check-ups, minor repairs, and awareness of TVS products and service plans. This master defines how such a camp is planned, run, and followed up within the DMS.

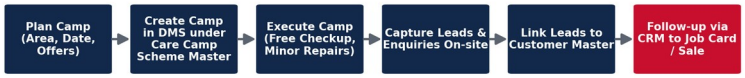
Plan Camp (Area, Date, Offers)
Create Camp in DMS under Care Camp Scheme Master
Execute Camp (Free Checkup, Minor Repairs)
Capture Leads & Enquiries On-site
Link Leads to Customer Master
Follow-up via CRM to Job Card / Sale

Figure 8.1 — Care Camp Scheme workflow, from planning to converted follow-up

Figure 12.1 — The Care Camp Scheme workflow, from planning through to converted follow-up.

12.1 Purpose

This master allows the dealership to define a specific outreach camp — its location (drawing on the Area Master), date, target audience, and the specific offers or checks included — and then to capture every enquiry and lead generated on the day directly into the DMS, so that the value of the camp can be measured in actual conversions, not just attendance.

12.2 Key Fields

Field	Description
Camp Code	Unique identifier for this specific camp instance
Area	Links to the Area Master, defining where the camp is held
Date / Duration	When the camp takes place
Offers Included	Free checks, discounted minor services, accessory offers, and so on
Target Vehicle Age / Segment	For example, vehicles past their free-service period, or a specific model range
Responsible Staff	Linked to the Employee Master for the team assigned to the camp
Leads Captured	Enquiries and vehicle check-in records generated during the camp

12.3 Why This Master Matters Beyond the Day of the Camp

Without a dedicated scheme master, outreach camps tend to be tracked (if at all) on paper sign-in sheets that are rarely, if ever, converted into DMS follow-up — meaning the dealership spends real time and money reaching potential customers, only to lose the leads immediately afterwards. Structuring the camp within the DMS ensures every enquiry captured on-site becomes a proper CRM lead, linked to the Customer Master, and enters the same follow-up and conversion tracking used for showroom enquiries.

12.4 Everyday Impact

- Leads and vehicle check-ups captured during a camp flow directly into CRM follow-up (see the main handbook's CRM chapter), rather than being lost on paper.
- Camp performance — footfall, checks performed, leads generated, and eventual conversion to sale or paid service — becomes a measurable report, allowing management to judge whether a camp location and format were worth repeating.
- Area-level camp history helps avoid over-concentrating outreach in one territory while neglecting another.

> ***Worked example:*** *Zamoto TVS plans a care camp in a rural ward within the Solwezi branch's territory, targeting vehicles more than two years old. The camp is set up in the DMS against that Area code, with a free 15-point check-up and a discounted brake-service offer. On the day, 40 vehicles are checked, 25 enquiries are logged directly into the DMS against the camp code, and over the following month, CRM follow-up converts 9 of those enquiries into paid service visits — all visible as a single, measurable camp performance report.*

12.5 Common Errors and Their Consequences

Error	Downstream Consequence
Leads captured on paper, not entered into DMS same day	Camp cost incurred with no measurable CRM follow-up or conversion
Camp not linked to a specific Area code	Cannot compare camp effectiveness across different territories
Offers/scheme terms not clearly defined before the camp	Inconsistent pricing or promises made by different staff on the day

13. How the Masters Work Together — A Complete Worked Example

The preceding chapters have deliberately looked at each master in isolation, to explain its individual purpose clearly. In real dealership life, however, every transaction draws on several masters simultaneously. This chapter walks through a single, complete example — a routine paid service visit — to show exactly how the masters combine behind the scenes.

13.1 The Scenario

A customer rides into the Lusaka branch on a TVS Raider 125 for a paid service. The vehicle is two years old and was originally sold by the dealership.

13.2 Step by Step: Which Masters Are Used, and Why

31. The service advisor searches by chassis number. The Customer Master instantly returns the correct, existing customer record and their full service history — no new customer is created.
32. The vehicle's model is confirmed against the Vehicle Model Master, which also confirms this variant's standard free-service schedule has already been completed, so this is correctly logged as a paid visit.
33. The technician diagnoses worn brake shoes. Model–Part Mapping confirms the exact, correct brake shoe part number for this specific model and production date range.
34. The Spare Part Master confirms the part's description and stock unit; Part Cost confirms what the dealership paid for it; Part Price automatically calculates what the customer will be charged.
35. The technician logs the labour operation against the Labour Master's standard 'front brake shoe replacement' code; Labour Price calculates the labour charge from the standard time and the current rate.
36. The job is attributed to the technician via the Employee Master, feeding into that technician's productivity report for the week.
37. The customer's address, held in the Customer Master, is mapped to an Area Master code, feeding into territory-level reporting on service volume.
38. Because this customer's area is due for a Care Camp Scheme visit next month, the CRM follow-up flags them for an invitation, since their vehicle profile matches the camp's target segment.

13.3 What This Example Demonstrates

A single job card, taking perhaps forty-five minutes of workshop time, silently drew on eight different masters to produce an accurate invoice, correct stock deduction, correct technician attribution, and correct territory and campaign data — with no manual lookup, calculation, or cross-referencing required from the service advisor or technician. This is the entire value proposition of disciplined Master Data: complexity handled once, in the background, so that front-line staff can move quickly and correctly.

13.4 The Cost of a Single Master Being Wrong

Now consider the same scenario if just one master had been incorrect. If Part Cost had not been updated after a recent TVS price revision, the margin report for this job would silently understate the true cost, making the parts department appear more profitable than it actually is. If the Customer Master had a duplicate record from an earlier visit, this service history would be split, meaning the next warranty check or CRM follow-up would not see

the complete picture. If the Labour Master's standard time were unrealistic, the customer would have been given an inaccurate delivery estimate. No single master operates in isolation — which is precisely why master data governance, covered next, matters as much as it does.

14. Master Data Governance and Best Practices

This closing chapter sets out the ongoing discipline required to keep every master covered in this book accurate over time — not just at initial setup, but through the constant small changes (a new part, a price revision, a new employee) that every dealership experiences continuously.

14.1 Who Should Be Allowed to Edit What

Master	Typical Edit Authority
Vehicle Model Master	TVS-controlled centrally; local fields by Dealer Admin only
Model–Part Mapping	Dealer Admin, ideally cross-checked against TVS parts catalogue updates
Spare Part Master	Dealer Admin / Parts Manager
Part Cost	Dealer Admin / Accounts, updated on every TVS price revision
Part Price	Dealer Admin, with margin policy sign-off from Director/Owner
Labour Master / Labour Price	Dealer Admin / Service Manager
Customer Master	Any front-line staff can create/search; merges restricted to Dealer Admin
Employee Master	Dealer Admin / HR
Area Master	Dealer Admin, reviewed periodically as territory changes
Care Camp Scheme	Dealer Admin / Marketing or CRM lead, per camp

14.2 The Search-First Habit

Every chapter in this book has returned to the same principle: search before you create. This single habit, applied consistently across Customer, Spare Part, and Vehicle Model masters, prevents the majority of data quality problems a dealership DMS ever encounters.

14.3 Review Cadence

Cadence	Review Activity
On every TVS price bulletin	Update Part Cost, Part Price, and Vehicle Model ex-showroom price without delay
Weekly	Review any Model–Part Mapping gaps flagged by technicians unable to find a part
Monthly	Review Customer Master for suspected duplicates; review Employee Master for joiners/leavers
Quarterly	Review Area Master boundaries against actual territory growth; review Labour Master standard times against actual technician performance
Per camp	Set up and close out each Care Camp Scheme record with final lead and conversion counts

14.4 A Second Pair of Eyes

For high-impact changes — a price change, a margin policy change, a bulk customer merge — a second person reviewing the change before it goes live catches errors that the person making the change, being close to it, is likely to miss. This costs a small amount of time and prevents disproportionately larger clean-up work later.

14.5 Closing Thought

Master Data will never be the most visible part of the DMS — no customer ever asks to see the Labour Master, and no technician thanks the system for a correctly mapped part number. But every fast, accurate, professional interaction the dealership has with a customer, from the sales counter to the workshop bay, is quietly made possible by the discipline described in this book. Treating master data maintenance as core, valued work — not an administrative afterthought — is what separates a dealership that merely operates a DMS from one that is genuinely run by one.

15. Glossary of Key Terms

A quick-reference glossary of the terms used throughout this handbook.

Term	Meaning
Master Data	Foundational reference information (models, parts, prices, customers) that every transaction depends on.
Model–Part Mapping	The approved list of parts (BOM) linked to a specific vehicle model.
BOM	Bill of Materials — the complete parts list that makes up a vehicle or assembly.
Dealer Price (DP)	The cost the dealership pays TVS/distributor for a part; recorded in Part Cost.
MRP	Maximum Retail Price — the ceiling selling price of a part, recorded in Part Price.
Standard Time	The expected duration of a labour operation under normal conditions, per the Labour Master.
Supersession	The replacement of an old part number by a newer one, recorded in the Spare Part Master.
Running Change	A minor mid-production specification update to a vehicle model, without a full model change.
Area Master	The geographic hierarchy (country/region/area/branch territory) used for planning and reporting.
Care Camp Scheme	An outreach service camp, typically in an under-served area, offering free checks and service offers.
CSI	Customer Satisfaction Index — a score reflecting customer feedback on sales/service experience.
Effective Date	The date from which a price, cost, or rate becomes active in the system.

16. Closing Notes

This handbook has deliberately gone deeper into Master Data than the main TVS DMS Training & Reference Handbook, because master data is where accuracy is either built in from the start, or quietly lost forever. Every master covered here — Vehicle Model, Model–Part Mapping, Spare Part, Part Cost, Part Price, Labour, Labour Price, Customer, Employee, Area, and Care Camp Scheme — plays its own distinct role, but they only deliver their full value when maintained together, consistently, by people who understand not just how to fill in a screen, but why that screen matters.

New Dealer Admin staff are encouraged to work through this handbook chapter by chapter alongside supervised practice on the live masters, ideally shadowing an experienced administrator through at least one full price revision, one new-model setup, and one care camp cycle before taking on these responsibilities independently.

— End of Handbook —

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PART III

Service Documents & Reports

This part covers the wider family of service-side documents and claim types: Proforma Invoice, Job Card and Job Card Invoice, Outwork Memo and Payment, appointment and reminder documents, service history and AMC, PPFR, every warranty and FSC claim type, SIB Part Return, and PND EOW Allocate.

Chapters in this part:

- Introduction: The Documents Behind Every Service Visit
- Proforma Invoice
- Job Card and Job Card Invoice
- Outwork Memo and Outwork Payment
- Service Appointment, Appointment Request and Service Request
- Service Reminder and PSF (Post Service Follow-up)
- Vehicle Service History and Service AMC
- PPFR — Product/Part Failure Report
- Warranty Claim, ASC Warranty Claim, AD Warranty Claim Report and Transit Claim
- Dealer FSC Claim, ASC FSC Claim and AD FSC Claim Report
- SIB Part Return
- PND EOW Allocate
- How These Documents Connect — A Complete Worked Example
- Best Practices and Common Mistakes Across These Documents
- Glossary of Key Terms
- Closing Notes

1. Introduction: The Documents Behind Every Service Visit

The main TVS DMS handbook explains the Service module as a single flow: check-in, job card, quality check, invoice, delivery. In real dealership practice, that flow is supported by a much wider family of documents and reports — some created automatically by the system, some raised manually by staff, and some existing purely to move money correctly between the dealership, TVS Motor Company, and other outlet types in the network. This handbook is dedicated to that wider family.

Service Request / Appointment Request
Service Appointment Confirmed
Job Card Created
Outwork Memo (if outsourced)
Job Card Invoice / Proforma Invoice
Vehicle Service History Updated
Service Reminder / PSF

Figure 1.1 — How the core service documents flow together, request to follow-up

Figure 1.1 — How the core service documents flow together, from the first request to post-service follow-up.

1.1 Three Types of Outlet You Will See Referenced Throughout This Book

Outlet Type	What It Is
Dealer (Main Workshop)	The full authorised dealership — sales, service and parts, such as Zamoto TVS
ASC — Authorised Service Centre	A smaller, service-only satellite outlet authorised by TVS, often extending coverage into areas without a full dealership
AD — Area Distributor	An outlet responsible for parts stockist and distribution across a defined rural or semi-urban territory

Several of the documents in this book — particularly the warranty and FSC claim types — exist in near-identical form for each of these three outlet types, simply because TVS needs to reimburse whichever outlet actually performed the covered work. Recognising this pattern (Dealer version, ASC version, AD version) makes the claim-related chapters far easier to follow.

1.2 The 22 Documents and Reports Covered in This Book

Document / Report	Chapter
Proforma Invoice	2
Job Card, Job Card Invoice	3
Outwork Memo, Outwork Payment	4
Service Appointment, Appointment Request, Service Request	5
Service Reminder, PSF (Post Service Follow-up)	6
Vehicle Service History, Service AMC	7

Document / Report	Chapter
PPFR (Product/Part Failure Report)	8
Warranty Claim, ASC Warranty Claim, AD Warranty Claim Report, Transit Claim	9
Dealer FSC Claim, ASC FSC Claim, AD FSC Claim Report	10
SIB Part Return	11
PND EOW Allocate	12

> ***A note on terminology:*** *A small number of the abbreviations covered in this book (particularly SIB and the exact scope of PND EOW Allocate) are used with local variation across the TVS dealer network. This handbook explains their standard operating purpose in full; where your dealership's exact configuration differs, confirm the local convention with your Dealer Admin.*

1.3 How This Book Is Organised

Chapters 2 through 12 group these 22 documents into logical families — core sales-to-invoice documents, outsourced work documents, appointment and reminder documents, history and contract records, quality reporting, warranty claims, FSC claims, parts return, and allocation — with each chapter following the same structure: purpose, when it is used, key fields, step-by-step process, who is responsible, and common mistakes to avoid.

2. Proforma Invoice

The Proforma Invoice is one of the most frequently misunderstood documents in the entire DMS, precisely because it looks almost identical to a real invoice — but is not one.

2.1 Purpose

A Proforma Invoice is a preliminary, non-binding bill of sale, prepared and shown to the customer before a final, fiscal invoice is raised. It sets out the expected price breakup — for a vehicle sale or, in the service context, for an estimated repair — so the customer can review, confirm, or query the amount before it becomes an official, tax-recorded transaction.

2.2 When It Is Used

- Vehicle sales: to confirm the on-road price breakup with the customer before final invoicing, particularly where financing or an exchange is involved and the exact figure may still move slightly.
- Major service or accident repair jobs: to give the customer a documented cost estimate before work proceeds, especially where the job value is high enough to need customer sign-off.
- Advance payment collection: many dealerships require a Proforma Invoice as the reference document against which an advance or deposit is collected, prior to the final invoice.

2.3 Key Fields

Field	Description
Proforma Number	System-generated reference, distinct from the final invoice number
Customer Details	Pulled from the Customer Master
Itemised Estimate	Vehicle price breakup, or parts and labour estimate for a repair
Validity Period	How long this estimate remains valid before requiring revision
Status	Draft / Sent to Customer / Confirmed / Converted to Invoice / Expired

2.4 Why It Is Not a Tax Document

Because a Proforma Invoice is not a fiscal document, it does not discharge any tax liability and cannot be used by the customer as proof of purchase, for insurance, for registration, or for warranty claims. Only the final invoice, generated after the Proforma Invoice is confirmed, carries that legal weight. Staff must be careful never to hand a Proforma Invoice to a customer as if it were the final bill, and never to treat a Proforma Invoice number as an invoice number in any downstream process.

> ***Important:*** *If a customer asks for 'the bill' to submit for insurance, financing, or registration, always confirm you are giving them the final tax invoice, not the Proforma Invoice.*

2.5 Everyday Impact

- Gives the customer a clear, written estimate before committing to a purchase or a costly repair, reducing billing disputes at delivery.

- Provides the reference document against which advances are collected and later adjusted into the final invoice.
- For accident/insurance repairs, the Proforma Invoice is frequently the document submitted to the insurer for repair approval before work begins.

2.6 Common Errors and Their Consequences

Error	Downstream Consequence
Proforma Invoice treated as a final bill	Customer confusion; document rejected by insurer, financier or registration authority
Estimate not revised when the job scope changes	Final invoice surprises the customer with a higher amount than expected
Proforma left open indefinitely, never converted or expired	Distorts pending-sales or pending-job reporting

3. Job Card and Job Card Invoice

The Job Card itself is covered in full in the main DMS handbook. This chapter focuses specifically on the Job Card Invoice — the document that closes out the job card — and on a small number of job-card details that matter especially once you start working with the other documents in this book.

3.1 Job Card — Quick Recap

The Job Card is the digital record that follows a vehicle from check-in through diagnosis, labour, parts issue, and quality check. Every other document in this handbook — Outwork Memo, PPFR, warranty and FSC claims — is either raised directly against an open job card or references a closed one, which is why job card discipline (accurate complaint description, correct visit type, correct labour and parts linkage) matters well beyond the job card screen itself.

3.2 Job Card Invoice — Purpose

The Job Card Invoice is the final, fiscal billing document generated once a job card passes quality check and is ready for customer handover. It itemises every labour operation and every part consumed on that job card, converting the internal job record into a legally valid tax invoice.

3.3 Key Fields

Field	Description
Invoice Number	System-generated, sequential, fiscally valid
Job Card Reference	Links back to the originating job card
Labour Lines	Each operation, its standard time, and its charge (or 'Free — FSC/Warranty')
Parts Lines	Each part issued, quantity, and Part Price
Tax	Calculated from the Tax Master, per the main DMS handbook
Payment Status	Paid / Partially Paid / Pending

3.4 The Relationship Between Estimate, Job Card and Invoice

For a straightforward paid service, the flow is simple: job card opens, work is done, invoice is generated directly. For a larger or less predictable job — an accident repair, a major engine overhaul — the more careful flow is: Proforma Invoice (estimate) → customer confirmation → job card work performed → Job Card Invoice generated, checked against the original estimate for any material variance that should be explained to the customer before payment is collected.

3.5 Everyday Impact

- The Job Card Invoice is the single most common document a customer receives from the workshop, and its accuracy is what the dealership's billing reputation is built on.
- It is the reference document for any subsequent warranty claim on the same repair, and for Vehicle Service History (Chapter 7).

- Accounts reconciliation, covered in the main handbook, depends on every Job Card Invoice being correctly closed and receipted.

3.6 Common Errors and Their Consequences

Error	Downstream Consequence
Invoice generated before quality check is complete	Customer billed for a job that may not actually be finished correctly
Labour/parts lines not matching what was actually done	Billing disputes and inaccurate job costing
Large variance from an earlier Proforma Invoice not explained	Customer trust damaged even where the higher charge is legitimate

4. Outwork Memo and Outwork Payment

Not every repair can be completed inside the dealership's own workshop. Specialist processes — precision boring, chrome plating, certain painting and denting work, specialised electronic repairs — are frequently sent out to an external, trusted vendor. The Outwork Memo and Outwork Payment documents exist to keep this outsourced work just as visible and accountable as work done in-house.

Job Requires Specialist Work (e.g. Boring, Painting)
Outwork Memo Raised in DMS (vendor, job, expected cost)
Vehicle/Part Sent to External Vendor
Work Received Back & Quality Checked
Outwork Payment Processed to Vendor
Cost Added to Job Card / Customer Invoice

Figure 4.1 — Outwork Memo and Outwork Payment in the outsourced-job workflow

Figure 4.1 — Outwork Memo and Outwork Payment in the outsourced-job workflow.

4.1 Outwork Memo — Purpose

The Outwork Memo is raised against an open job card whenever part of the work is sent to an external vendor. It records exactly what is being sent out, to whom, the expected cost, and the expected return date, so that a part or vehicle physically outside the dealership's premises is still fully tracked within the DMS.

4.2 Key Fields — Outwork Memo

Field	Description
Memo Number	System-generated reference
Job Card Reference	Links back to the originating job card
Vendor Details	Name and contact of the external workshop/specialist
Item(s) Sent	Part or sub-assembly description and quantity
Work Requested	Description of the specialist work required
Expected Cost	Vendor's quoted price for the outwork
Expected Return Date	Committed date the item will come back
Status	Sent / In Progress / Received / Quality Checked

4.3 Outwork Payment — Purpose

Once the outsourced work is received back and quality checked, Outwork Payment records the actual payment made to the external vendor, closing the financial loop that the Outwork Memo opened. This amount also feeds into the true cost of the job card, which is essential for accurate job costing — a job that included outwork is not fully costed until the outwork payment is recorded.

4.4 Key Fields — Outwork Payment

Field	Description
Outwork Memo Reference	Links back to the originating memo
Actual Amount Paid	May differ from the originally expected cost
Payment Date and Method	Cash, bank transfer, or account settlement
Variance Note	Explanation if actual cost differs materially from expected cost

4.5 Everyday Impact

- Keeps a physically absent part or vehicle traceable, with a clear expected return date the service advisor can commit to with the customer.
- Ensures the true, full cost of a job — including third-party specialist work — is captured for accurate job costing and, where relevant, correct customer billing.
- Builds a vendor performance history over time (turnaround time, cost consistency, quality) that is useful when choosing which specialist to use for future jobs.

4.6 Common Errors and Their Consequences

Error	Downstream Consequence
Item sent to vendor without an Outwork Memo	No system record of where a customer's part physically is
Outwork Payment never recorded	Job costing understates the true cost of the repair
Large variance between expected and actual cost not queried	Vendor pricing discipline erodes over time unnoticed

5. Service Appointment, Appointment Request and Service Request

These three related documents manage everything that happens before a vehicle physically arrives at the workshop — the difference between a chaotic, first-come queue and a workshop that can plan its technician capacity a day or a week in advance.

5.1 Service Request — Purpose

A Service Request is the broadest of the three: any indication from a customer that they need service, captured through any channel — a phone call, a walk-in enquiry, an app, or a follow-up call from a previous visit. It does not yet commit to a specific date or time; it simply records that the need exists and should be actioned.

5.2 Appointment Request — Purpose

An Appointment Request is a Service Request that has progressed to proposing a specific date and time, initiated either by the customer (through a booking channel) or by the service advisor on the customer's behalf. It is a proposal, not yet a confirmed slot — the workshop must check technician and bay capacity before confirming it.

5.3 Service Appointment — Purpose

A Service Appointment is the confirmed booking: a specific date, time, technician or bay capacity reserved, and (where the DMS supports it) the expected service type pre-loaded so the correct parts can be reserved in advance. This is what allows a workshop to run a predictable, appointment-based schedule instead of pure walk-in chaos.

5.4 Key Fields Across All Three

Field	Description
Customer / Vehicle Reference	Linked to Customer Master and chassis number
Requested / Confirmed Date-Time	As applicable to the document stage
Service Type Expected	Free, paid, warranty, or accident, where known in advance
Capacity Check Result	Whether a bay/technician slot is genuinely available
Status	Requested / Confirmed / Rescheduled / Cancelled / Converted to Job Card

5.5 Why the Three-Stage Distinction Matters

Treating every enquiry as an immediate confirmed appointment leads to over-booking and broken promises to customers; treating every enquiry as a vague, undated request leads to no forward visibility at all for capacity planning. The three-stage model — Request, Appointment Request, confirmed Appointment — gives the workshop a genuine, checked pipeline it can plan around, similar in spirit to how Sales manages enquiries through to bookings.

5.6 Everyday Impact

- Confirmed Service Appointments allow the workshop to pre-pull likely-needed parts, reducing delay on the day of service.

- Appointment-based scheduling reduces walk-in queue congestion and improves the accuracy of delivery time estimates given to customers.
- An Appointment Request that is never converted or explicitly cancelled distorts the workshop's forward capacity view.

5.7 Common Errors and Their Consequences

Error	Downstream Consequence
Appointment confirmed without a genuine capacity check	Overbooked bay, customer delay and broken promised delivery time
Requests never followed up or converted	Lost service business that appeared to be captured but never materialised
No-show appointments not marked as such	Inaccurate future capacity and conversion reporting

6. Service Reminder and PSF (Post Service Follow-up)

These two documents sit on either side of a service visit: the Service Reminder brings the customer in before their service is due, and PSF checks in with them after the visit is complete. Together they are the backbone of a dealership's service retention effort.

6.1 Service Reminder — Purpose

A Service Reminder is a system-generated prompt — typically an SMS, call-back task, or app notification — alerting a customer that their vehicle is due, or soon due, for free service, paid service, or a warranty-related check, based on the vehicle's delivery date, last service date, or odometer reading held in Vehicle Service History.

6.2 Key Fields — Service Reminder

Field	Description
Vehicle / Customer Reference	From Customer Master and Vehicle Service History
Reminder Trigger	Date-based, mileage-based, or both
Reminder Channel	SMS, call, app notification, per customer communication preference
Response Status	No response / Appointment booked / Declined

6.3 PSF — Purpose

PSF (Post Service Follow-up) is a structured contact with the customer, typically a phone call made a small number of days after service delivery (commonly around the sixth day, per standard TVS dealer practice), to check the vehicle is performing correctly and the customer is satisfied with both the repair and the overall workshop experience. Where a customer is found dissatisfied during PSF, they should be logged into a dissatisfied-customer register and followed up until genuinely resolved, not simply noted and left.

6.4 Key Fields — PSF

Field	Description
Job Card Reference	The service visit being followed up on
Call Date	Typically a fixed number of days after delivery, per dealership SOP
Talking Points Covered	Standard questions per the dealership's PSF script
Satisfaction Outcome	Satisfied / Dissatisfied, with details if dissatisfied
Escalation Status	Whether a dissatisfied case has been escalated and resolved

6.5 Everyday Impact

- Service Reminders are one of the most effective, low-cost tools a dealership has for retaining service revenue over a vehicle's lifetime.
- PSF surfaces quality problems the customer might otherwise never report back to the dealership, giving management a chance to fix a repeat issue before it damages the dealership's reputation more broadly.

- Both feed into Customer Satisfaction Index (CSI) reporting used both internally and by TVS to assess dealer performance.

6.6 Common Errors and Their Consequences

Error	Downstream Consequence
Reminders sent to an outdated contact number	Missed service revenue and reduced customer retention
PSF calls skipped or rushed through without genuine listening	Dissatisfaction goes unnoticed until it becomes a larger complaint
Dissatisfied cases logged but never followed up to resolution	Repeated dissatisfaction and declining CSI scores

7. Vehicle Service History and Service AMC

Vehicle Service History is the permanent record every other service document ultimately contributes to; Service AMC (Annual Maintenance Contract) is a commercial arrangement built on top of that history.

7.1 Vehicle Service History — Purpose

This is the complete, chronological record of every service visit a vehicle has ever had — every job card, every invoice, every warranty claim, every PSF outcome — organised against the vehicle's chassis number. It is what a service advisor reviews at every check-in, what a warranty reviewer checks before approving a claim, and what a technician consults to understand a vehicle's repair pattern rather than treating each visit as if the vehicle had no past.

7.2 Key Fields — Vehicle Service History

Field	Description
Chassis Number	The permanent vehicle identifier this history is built against
Visit Log	Date, visit type, job card and invoice references for every visit
Odometer Progression	Odometer reading recorded at each visit
Warranty/FSC Usage	Which coverage has already been claimed on this vehicle
Outstanding Recalls/Campaigns	Any manufacturer service campaign not yet actioned on this vehicle

7.3 Service AMC — Purpose

A Service AMC is a contract, purchased by the customer, that pre-pays for a defined package of future services (typically a number of paid services over a fixed period or mileage) at a bundled price, in exchange for the convenience of not paying per visit and, usually, a modest overall discount compared with paying for each service individually.

7.4 Key Fields — Service AMC

Field	Description
AMC Contract Number	Unique reference for this contract
Coverage Period / Mileage	Duration and/or distance covered
Services Included	Number and type of services covered under the contract
Services Consumed	How many of the included services have already been used
Contract Value	Amount the customer paid for the AMC

7.5 How the Two Connect

Every service performed under an active AMC is still logged in full in Vehicle Service History, exactly like any other visit — the AMC simply changes how that visit is billed (drawn down against the pre-paid contract rather than

charged individually). A service advisor checking a vehicle in should always check for an active AMC before invoicing, since billing an AMC-covered service as a normal paid visit both overcharges the customer and fails to draw down the contract correctly.

7.6 Everyday Impact

- Vehicle Service History is the single most consulted record in the entire Service module, referenced at nearly every check-in, warranty review, and CRM follow-up.
- Service AMC gives the dealership predictable, pre-collected service revenue and encourages customer retention over the life of the vehicle.
- An incomplete or inaccurate service history undermines warranty claim credibility, since claims reviewers rely on it to confirm a vehicle's genuine maintenance pattern.

7.7 Common Errors and Their Consequences

Error	Downstream Consequence
A visit not properly logged against the chassis number	Incomplete history damages future warranty claims on that vehicle
AMC-covered service billed as a normal paid visit	Customer overcharged; AMC contract not correctly drawn down
AMC services-consumed count not updated	Contract exhausted without the dealership or customer realising it

8. PPFR — Product/Part Failure Report

PPFR stands for Product/Part Failure Report. It is a quality-feedback document, distinct from a warranty claim, whose purpose is to alert TVS Motor Company (TVSM) to a failure pattern — not primarily to seek reimbursement for a specific repair, though the two are often related.

8.1 Purpose

Where a warranty claim exists to recover the cost of a specific covered repair, a PPFR exists to feed quality information back to TVS's product and quality teams — particularly for failures that are unusual, premature, or appear to be recurring across multiple vehicles of the same model. It is the formal channel through which a dealership's hands-on experience of a genuine design or manufacturing issue reaches the people at TVS who can act on it at a product level.

8.2 When to Raise a PPFR

- A part fails significantly earlier than would normally be expected for its type and the vehicle's usage.
- The same failure is observed across multiple vehicles of the same model, suggesting a pattern rather than an isolated case.
- A failure has, or could have had, a safety implication.
- A technician observes a failure mode that does not match any documented, expected fault for that component.

8.3 Key Fields

Field	Description
Report Number	System-generated reference
Model / Chassis / Part Number	Full identification of the vehicle and failed component
Failure Description	Technical description of exactly how the part failed
Usage at Failure	Odometer reading and time in service at the point of failure
Supporting Evidence	Photographs, and the failed part retained for inspection
Linked Job Card / Warranty Claim	Reference to the associated repair, if applicable

8.4 PPFR and Warranty Claims Are Complementary, Not Duplicates

A single failure often generates both a warranty claim (to recover the repair cost) and a PPFR (to flag the failure pattern to TVS's quality team) — raising one does not replace the need for the other where both apply. The workshop team responsible for generating PPFR reports typically works closely with the warranty assistant so that supporting evidence is captured once and used for both documents.

8.5 Everyday Impact

- A consistent stream of accurate PPFR reports is one of the ways a dealership's hands-on experience genuinely influences TVS product quality over time.

- Well-documented PPFRs, with clear evidence, also strengthen the credibility of related warranty and goodwill claims.
- Failure trend visibility (multiple PPFRs on the same part/model) can prompt proactive customer outreach before a wider problem develops.

8.6 Common Errors and Their Consequences

Error	Downstream Consequence
Failure pattern noticed but never formally reported	TVS never becomes aware of a genuine, recurring quality issue
Failed part discarded before PPFR evidence is captured	Report lacks the physical evidence needed for TVS review
Vague failure description	Report has limited value to TVS's quality/engineering review

9. Warranty Claim, ASC Warranty Claim, AD Warranty Claim Report and Transit Claim

The main DMS handbook covers the general warranty claim workflow in depth. This chapter focuses specifically on why four related but distinct warranty claim types exist, and how to tell which one applies to a given situation.

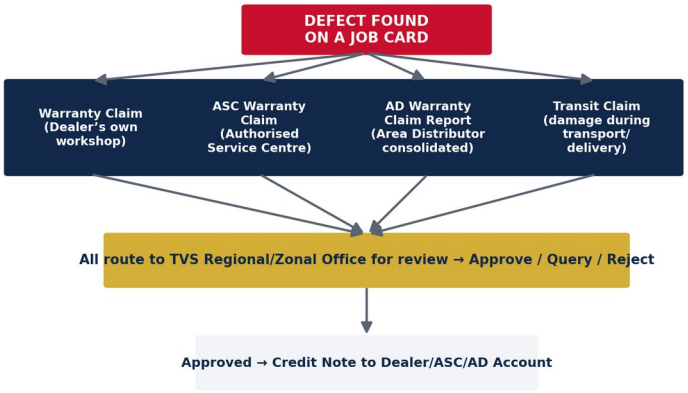
DEFECT FOUND ON A JOB CARD
Warranty Claim (Dealer's own workshop)
ASC Warranty Claim (Authorised Service Centre)
AD Warranty Claim Report (Area Distributor consolidated)
Transit Claim (damage during transport/ delivery)
All route to TVS Regional/Zonal Office for review → Approve / Query / Reject
Approved → Credit Note to Dealer/ASC/AD Account

Figure 9.1 — The four warranty claim routes and where each originates

Figure 9.1 — The four warranty claim routes and where each originates.

9.1 Warranty Claim (Dealer)

This is the standard warranty claim, covered in full in the main handbook, raised by the dealership's own workshop against a job card for a manufacturing or material defect within warranty terms. It is the most common of the four types for a full-service dealership such as Zamoto TVS.

9.2 ASC Warranty Claim

Where the repair was carried out at an Authorised Service Centre rather than the main dealership workshop, the claim is raised as an ASC Warranty Claim. The documentation requirements are identical in substance to a standard dealer warranty claim (defect description, odometer reading, photographs, retained failed part), but the claim is attributed to, and reimbursed to, the ASC that actually performed the work.

9.3 AD Warranty Claim Report

This is a consolidated report, typically compiled at the Area Distributor level, summarising warranty claims arising from the AD's territory — useful where an Area Distributor coordinates parts and basic service support across a rural area that includes several smaller outlets or authorised repairers without full ASC status. It gives TVS regional management a territory-level view of warranty activity, in addition to the individual claim-level detail.

9.4 Transit Claim

A Transit Claim is distinct in kind from the other three: it covers damage that occurs during transport or delivery — for example, a vehicle damaged while being transported from the factory or regional stockyard to the dealership, or a part damaged in transit from TVS to the dealer's parts store — rather than a manufacturing defect discovered in use. Because the cause is handling/transport damage rather than a product defect, the evidence required

differs: photographs of the damage as received, the transport documentation (waybill/delivery note), and ideally photographs taken at the point of unloading, before the item is moved into general stock.

9.5 Comparison at a Glance

Claim Type	Raised By	Covers
Warranty Claim	Dealer workshop	Manufacturing/material defect, repaired at the dealership
ASC Warranty Claim	Authorised Service Centre	Same as above, repaired at an ASC
AD Warranty Claim Report	Area Distributor	Consolidated territory-level warranty activity
Transit Claim	Dealer or AD, at receipt	Damage occurring during transport/delivery, not a product defect

9.6 Everyday Impact

- Choosing the correct claim type the first time avoids rejection and re-submission delay.
- Transit Claims, raised promptly at the point of receipt with photographic evidence, are far more likely to be accepted than damage reported after the item has already been moved into general stock or fitted to a vehicle.
- AD-level consolidated reporting helps TVS and the dealer group identify territory-wide patterns that an individual claim view might miss.

9.7 Common Errors and Their Consequences

Error	Downstream Consequence
Transit damage reported as a standard warranty claim	Claim rejected for being the wrong category, causing delay
ASC-performed repair claimed under the dealer's own warranty claim	Incorrect outlet reimbursed; ASC's own performance record understated
Transit damage not photographed immediately on receipt	Difficult to prove the damage occurred before receipt, not after

10. Dealer FSC Claim, ASC FSC Claim and AD FSC Claim Report

FSC stands for Free Service Coupon — the scheduled free services included with a new TVS vehicle. These three documents mirror the warranty claim family from Chapter 9 exactly, but for free-service reimbursement rather than defect-repair reimbursement.

Customer Due for Free Service (FSC)
FSC Job Card Raised (Dealer / ASC)
Labour + Eligible Parts Marked 'FSC Covered'
FSC Claim Submitted Dealer / ASC / AD
TVS Reviews & Approves Claim
Credit Note to Claiming Outlet

Figure 10.1 — Free Service Coupon (FSC) claim flow, from due service to credit note

Figure 10.1 — Free Service Coupon (FSC) claim flow, from due service to credit note.

10.1 What FSC Covers

New TVS vehicles are typically sold with a defined number of scheduled free services (labour free, and in some cases specified consumables included) within an initial period or mileage after purchase. The dealership, ASC, or AD that performs these services is not paid by the customer for the labour, so TVS reimburses the performing outlet through an FSC claim, in much the same way it reimburses warranty repairs.

10.2 Dealer FSC Claim

Raised by the dealership's own workshop for a free service performed under the FSC scheme, referencing the job card, the service number in the customer's FSC schedule (for example, 1st, 2nd, or 3rd free service), and the odometer reading confirming the service falls within the eligible window.

10.3 ASC FSC Claim

The equivalent claim where the free service was performed at an Authorised Service Centre rather than the main dealership — common where a customer lives closer to an ASC than to the full dealership workshop.

10.4 AD FSC Claim Report

A consolidated, territory-level report of FSC claims arising from an Area Distributor's coverage area, giving TVS regional management visibility of free-service delivery and uptake across a rural or semi-urban territory, in addition to individual claim-level detail.

10.5 Key Fields Across All Three

Field	Description
Job Card Reference	The free service visit being claimed
FSC Schedule Number	Which scheduled free service this is (1st, 2nd, 3rd, and so on)
Odometer / Date at Service	Confirms the service falls within the eligible window
Labour and Eligible Consumables	Items covered under the FSC scheme for this service number

Field	Description
Claim Status	Raised / Queried / Approved / Rejected

10.6 Everyday Impact

- Correctly claimed FSC visits ensure the dealership, ASC, or AD is properly compensated for labour it is contractually not permitted to charge the customer for.
- FSC uptake data (how many eligible customers actually return for their free services) is a meaningful indicator of customer retention and satisfaction.
- FSC visits still update Vehicle Service History in full, and are what the free-service-schedule tracking covered in the main handbook relies on.

10.7 Common Errors and Their Consequences

Error	Downstream Consequence
FSC visit invoiced as a normal paid service	Customer wrongly charged for labour that should have been free
FSC claim not raised after performing the free service	Dealership/ASC absorbs a labour cost TVS would have reimbursed
Wrong FSC schedule number claimed	Claim rejected or customer's remaining free service entitlement miscalculated

11. SIB Part Return

SIB Part Return manages the structured process of returning parts out of dealership stock back through the supply chain — whether because a part is faulty, obsolete, wrongly supplied, or simply surplus to requirement.

11.1 Purpose

This document formalises a parts return, creating a clear, auditable record of what is being returned, why, and what should happen to the dealership's stock and account as a result — rather than a part simply disappearing from the shelf with no trace of where it went or why.

11.2 Common Reasons a Part Return Is Raised

- A part received via GRN was later found to be defective or damaged, and is being returned to TVS/distributor.
- A part was ordered or supplied in error and needs to be returned to correct the stock position.
- A part has been identified as slow-moving or obsolete stock, per the review process covered in the main DMS handbook, and is being returned under TVS's applicable return policy.
- A part was issued for a job but not actually used, and is being returned to stock (an internal return, rather than a return to TVS).

11.3 Key Fields

Field	Description
Return Reference Number	System-generated, unique to this return
Part Number and Quantity	Linked to the Spare Part Master
Original GRN / Purchase Reference	Where the part was originally received into stock
Reason for Return	Defective, wrongly supplied, obsolete, or unused-internal-return
Return Destination	Back to TVS/distributor, or back to dealership shelf stock
Credit Status	Whether a credit note has been received for the returned value

11.4 Why This Process Should Never Be Informal

Returning a part without raising a formal return document is one of the more common ways stock and financial records quietly drift out of alignment — the shelf no longer has the part, but the system still shows it in stock, or a credit that should have been received from TVS is never chased up because there is no record it is owed. The discipline described in Chapter 5 of the main DMS handbook (accurate GRN, accurate stock movement) applies just as strongly to returns leaving the store as it does to goods arriving into it.

11.5 Everyday Impact

- Keeps stock records accurate by ensuring every part leaving the shelf for any reason, including return, is properly recorded.
- Ensures the dealership actually receives the credit it is entitled to for defective or returnable stock, rather than absorbing the cost silently.

- Feeds into supplier/TVS quality feedback where returns are concentrated on a specific part number, complementing the PPFR process in Chapter 8.

11.6 Common Errors and Their Consequences

Error	Downstream Consequence
Part physically returned without a formal return record	Stock ledger and physical shelf fall out of alignment
Credit note not tracked and chased	Dealership absorbs the cost of a legitimately returnable part
Reason for return not accurately recorded	Return/quality trend analysis on that part number becomes unreliable

12. PND EOW Allocate

PND EOW Allocate is a Sales-side allocation tool that clears the backlog of vehicles awaiting a match to a confirmed booking, run as a structured exercise rather than allocated one at a time as staff happen to think of it.

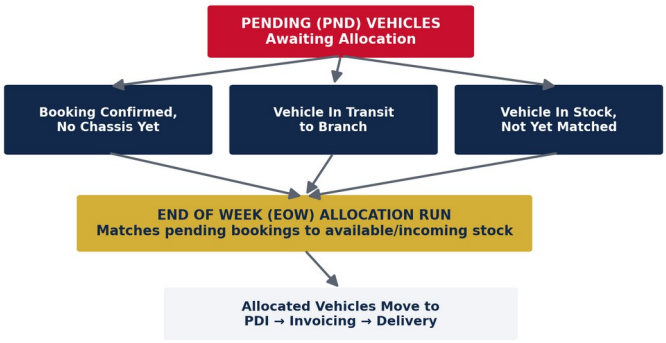

Figure 12.1 — PND EOW Allocate: clearing the pending-allocation backlog

Figure 12.1 — PND EOW Allocate: clearing the pending-allocation backlog.

12.1 Purpose

At any given time, a dealership typically has a number of confirmed bookings without a matched chassis — pending (PND) allocation — alongside vehicles that are in stock, or arriving shortly, without yet being matched to a specific customer. PND EOW Allocate is the structured process of reviewing this pending list, typically run as a recurring exercise (commonly at the end of the week, hence EOW), and systematically matching pending bookings against available or incoming stock.

12.2 Why a Structured, Periodic Run Rather Than Ad Hoc Allocation

Allocating vehicles purely ad hoc, whenever a sales executive happens to notice a match, tends to favour whichever customer's executive is paying attention that day rather than the customer who has been waiting longest or whose booking terms give them priority. A structured allocation run applies the dealership's allocation policy (typically booking date order, subject to any specific colour/variant constraints) consistently across every pending booking at once.

12.3 Key Fields

Field	Description
Allocation Run Reference	Identifies this specific allocation exercise
Pending Bookings List	Every booking without a matched chassis at the time of the run
Available/Incoming Stock List	Every unallocated chassis in stock or confirmed incoming
Allocation Result	The matches made in this run, booking to chassis
Still-Pending After Run	Bookings that remain unmatched, carried to the next run

12.4 Everyday Impact

- Gives sales management a clear, regular view of exactly how large the pending-allocation backlog is, and whether it is growing or shrinking.
- Applies allocation policy consistently and fairly across all pending customers, rather than favouring whoever is asked about first.
- Feeds directly into PDI and invoicing scheduling, since a vehicle cannot proceed to PDI until it has been allocated.

12.5 Common Errors and Their Consequences

Error	Downstream Consequence
Allocation run skipped or irregular	Pending backlog grows unnoticed, and waiting customers are not served in fair order
Allocation policy not consistently applied	Customer complaints about perceived favouritism in vehicle allocation
Still-pending bookings not actively communicated to customers	Customer frustration even where the delay is a genuine, unavoidable stock shortage

13. How These Documents Connect — A Complete Worked Example

This chapter follows a single customer through several of the documents covered in this book, to show how they connect in practice rather than as isolated topics.

13.1 The Scenario

A customer's TVS King Deluxe three-wheeler, sold eighteen months ago by Zamoto TVS Lusaka, develops a starter fault. The customer has an active Service AMC, and is still within the FSC-eligible window for one remaining free service.

13.2 Step by Step

39. A Service Reminder had already prompted the customer that a scheduled service was due; the customer responds and an Appointment Request is raised, then confirmed as a Service Appointment for the following Tuesday.
40. On arrival, the service advisor checks Vehicle Service History and confirms the active AMC and remaining FSC entitlement before opening the Job Card.
41. Diagnosis finds a worn kick spring in the starter mechanism — a known, recurring pattern the workshop has seen on this model, so a PPFR is raised alongside the repair, with photographs of the failed spring retained.
42. Because this is assessed as a manufacturing defect within warranty terms, a Warranty Claim is raised against the job card, referencing the PPFR.
43. The scheduled service itself is billed under the active FSC entitlement via a Dealer FSC Claim, while the starter repair is billed under the Warranty Claim — neither charged directly to the customer.
44. The Job Card Invoice reflects both as covered items; on quality check and closure, Vehicle Service History is updated with the full visit detail, the FSC entitlement count, and the warranty claim reference.
45. Six days after delivery, a PSF call confirms the starter is working correctly and the customer is satisfied; this closes the loop, and a fresh Service Reminder is scheduled for the vehicle's next due service.

13.3 What This Demonstrates

A single visit drew on a Service Reminder, an Appointment Request and Appointment, Vehicle Service History, Service AMC, a PPFR, a Warranty Claim, an FSC Claim, a Job Card Invoice, and finally PSF — nine of the documents covered in this book, each playing a distinct, necessary role, without the customer ever needing to understand any of this complexity. That invisibility to the customer is the entire point: the documentation exists so the experience feels simple, accurate, and trustworthy on the other side of the counter.

14. Best Practices and Common Mistakes Across These Documents

This closing chapter draws together the recurring themes from every chapter in this book into a single, practical checklist.

14.1 Golden Rules

46. Never present a Proforma Invoice as if it were the final, fiscal invoice.
47. Always raise an Outwork Memo before any part or vehicle leaves the premises for external work.
48. Treat Service Request, Appointment Request, and confirmed Appointment as three genuinely distinct stages, not interchangeable labels.
49. Never skip a PSF call, and always escalate genuine dissatisfaction rather than simply logging it.
50. Choose the correct warranty claim type (Dealer, ASC, AD, or Transit) based on where the work was done and what caused the defect, not out of habit.
51. Never bill an FSC-covered or warranty-covered item to the customer, and never let an eligible FSC or warranty claim go unclaimed.
52. Raise a formal SIB Part Return for every part leaving stock for return, rather than an informal handover.
53. Run PND EOW Allocate on a genuinely regular cadence, and communicate proactively with customers still pending after each run.

14.2 A Quick Reference: Which Document Do I Need?

Situation	Document to Use
Customer wants a cost estimate before committing	Proforma Invoice
Job needs specialist work outside the workshop	Outwork Memo, then Outwork Payment
Customer wants to book a future service slot	Appointment Request → Service Appointment
Vehicle is due for its next service	Service Reminder
Checking in on a customer after service delivery	PSF
Reviewing what has been done to a vehicle before	Vehicle Service History
Customer has pre-paid for a service package	Service AMC
A part failed in an unusual or recurring way	PPFR
A defect needs to be claimed back to TVS	Warranty Claim / ASC Warranty Claim / AD Warranty Claim Report
Damage occurred during transport, not use	Transit Claim
A free scheduled service needs to be claimed	Dealer FSC Claim / ASC FSC Claim / AD FSC Claim Report
A part needs to leave stock for return	SIB Part Return
Bookings are piling up unmatched to stock	PND EOW Allocate

14.3 Closing Thought

None of the twenty-two documents in this book exist for their own sake. Each one exists because, at some point in TVS's long experience running a national and international dealer network, some piece of information needed a proper home — a way to be captured, tracked, and acted on — rather than being remembered informally or lost. Learning them well is not paperwork for its own sake; it is what allows a workshop as busy as Zamoto TVS's to run quickly and correctly at the same time.

15. Glossary of Key Terms

A quick-reference glossary of the abbreviations and terms used throughout this handbook.

Term	Meaning
ASC	Authorised Service Centre — a smaller, service-only satellite outlet authorised by TVS.
AD	Area Distributor — an outlet responsible for parts stockist/distribution across a defined territory.
FSC	Free Service Coupon — the scheduled free services included with a new TVS vehicle.
PSF	Post Service Follow-up — a structured customer contact after service delivery.
PPFR	Product/Part Failure Report — a quality-feedback report on unusual or recurring part failures, sent to TVSM.
AMC	Annual Maintenance Contract — a pre-paid package of future services.
PND	Pending — used here for bookings awaiting vehicle allocation.
EOW	End of Week — the typical cadence of a PND allocation run.
SIB	The formal parts-return process used to return defective, obsolete, or unused stock.
TVSM	TVS Motor Company, the manufacturer, as referenced in dealer-to-manufacturer reporting.
Transit Claim	A claim for damage occurring during transport/delivery, distinct from a product-defect warranty claim.
Proforma Invoice	A non-binding, preliminary bill of sale shown to a customer before the final invoice.

16. Closing Notes

This handbook has intentionally focused on the documents and reports that sit slightly outside the core, everyday screens covered in the main TVS DMS Training & Reference Handbook — the ones new staff often learn later, informally, and sometimes incompletely. Understanding them properly from the start avoids exactly the kind of confusion, mis-billed customer, or missed claim that this book has tried to walk through in detail.

As with the other handbooks in this series, staff are encouraged to work through this book alongside supervised practice on the live system, ideally handling at least one example of each document type — a Proforma Invoice, an Outwork Memo, each warranty and FSC claim variant, a PND EOW Allocation run — before taking on these responsibilities independently.

— End of Handbook —

Compiled by श्री. योगेश मिरजकर

PART IV

Ledger & Accounts Operations

This part covers five closely related Accounts-side functions: View Ledger Entries, Credit Note, Debit Note, Bank Adjustment, and Bank Reconciliation — the discipline that keeps a dealership's financial records accurate and trustworthy.

Chapters in this part:

- Introduction: Why Ledger Discipline Matters
- View Ledger Entries
- Credit Note
- Debit Note
- Bank Adjustment
- Bank Reconciliation
- How These Five Functions Work Together — A Complete Worked Example
- Best Practices and Common Mistakes
- Glossary of Key Terms
- Closing Notes

1. Introduction: Why Ledger Discipline Matters

Every chapter in the earlier handbooks of this series eventually pointed to the same destination: Accounts. A sales invoice, a job card invoice, a warranty credit, a parts return — each one is, underneath the surface, a ledger entry. This handbook is dedicated to the five screens where that underlying financial reality is actually recorded, checked, and corrected.

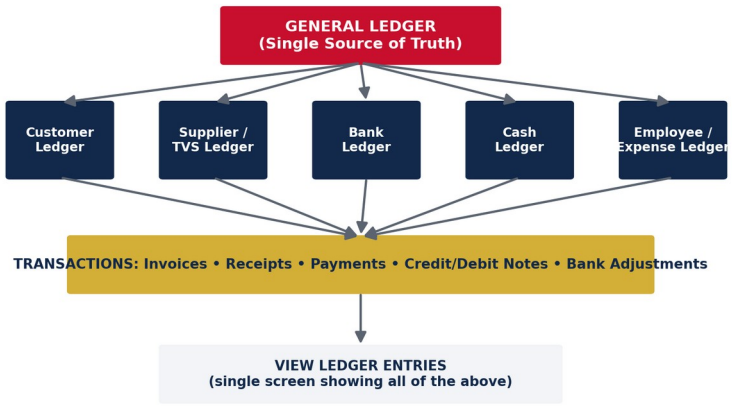
GENERAL LEDGER
(Single Source of Truth)
Customer Ledger
Supplier / TVS Ledger
Bank Ledger
Cash Ledger
Employee / Expense Ledger
TRANSACTIONS: Invoices • Receipts • Payments • Credit/Debit Notes • Bank Adjustments
VIEW LEDGER ENTRIES
(single screen showing all of the above)

Figure 1.1 — How every ledger feeds into View Ledger Entries

Figure 1.1 — How every ledger (customer, supplier, bank, cash, expense) feeds into a single View Ledger Entries screen.

1.1 The Five Functions Covered in This Book

Function	In Simple Terms
View Ledger Entries	See every transaction recorded against a specific account, in order
Credit Note	A document that reduces what an account owes
Debit Note	A document that increases what an account owes
Bank Adjustment	A correction entry made directly against the bank ledger
Bank Reconciliation	The process of checking the DMS bank ledger against the actual bank statement

1.2 Debits and Credits, in Plain Language

Before going further, it helps to fix two words that are used constantly in this book and are easy to misremember under pressure. A debit entry increases the amount an account owes (or decreases what is owed to that account, depending on which side of the relationship you are viewing). A credit entry does the opposite — it decreases the amount owed. This single distinction is the foundation for understanding every one of the five functions in this book, and Chapter 2 returns to it with a visual explanation.

> ***Memory aid:*** *A simple way to remember it for a customer account: an Invoice is a debit (the customer now owes more) and a Payment or Credit Note is a credit (the customer now owes less).*

1.3 Why These Functions Deserve Their Own Handbook

Sales and Service staff interact with Accounts indirectly, through invoices and receipts that are generated automatically from their own transactions. Accounts staff, and increasingly Dealer Admin more broadly, need a working understanding of these five functions specifically, because they are where genuine errors — an overcharge, an underpayment, a bank entry that does not match — are actually found and corrected. Getting them right is what allows a dealership to trust its own numbers, whether reporting to TVS, to a bank, or to its own owners.

1.4 How This Book Is Organised

Chapter 2 covers View Ledger Entries, the screen every other chapter refers back to. Chapters 3 and 4 cover Credit Note and Debit Note as a pair, since they are best understood together. Chapters 5 and 6 cover Bank Adjustment and Bank Reconciliation, again as a closely related pair. Chapter 7 walks through a complete worked example touching all five functions, Chapter 8 sets out best practice and common mistakes, and the book closes with a glossary.

2. View Ledger Entries

View Ledger Entries is the screen that makes every other function in this book meaningful — without a clear, reliable way to see what has actually been recorded against an account, a Credit Note or a Bank Adjustment is just an entry made in the dark.

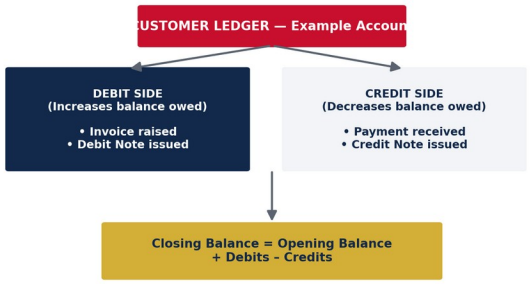

Figure 2.1 — How a ledger account balance is built from debit and credit entries

Figure 2.1 — How a ledger account balance is built from debit and credit entries.

2.1 Purpose

This screen displays every transaction posted against a chosen account — a specific customer, a supplier or TVS running account, the dealership's bank account, or any other ledger head — in chronological order, showing each entry's date, type, amount, whether it is a debit or a credit, and the running balance after each entry.

2.2 Key Fields

Field	Description
Account Selected	The specific customer, supplier, bank, or other ledger head being viewed
Date Range	The period being reviewed
Entry Type	Invoice, Receipt, Payment, Credit Note, Debit Note, Bank Adjustment, and so on
Debit / Credit Amount	The value and direction of each individual entry
Running Balance	The account balance after each entry is applied, in sequence
Reference Document	The source document each entry originated from (invoice number, note number, and so on)

2.3 How to Read a Ledger Correctly

The single most important habit when using this screen is to read the running balance as a story unfolding over time, not just look at the final number. A customer's final balance might correctly show zero, but the path to get there — a large invoice, an unexpectedly large credit note, a late payment — often tells you something worth investigating even when the ending total looks fine.

2.4 Common Uses

- A customer disputes an amount they believe they have already paid: View Ledger Entries shows every receipt and invoice against their account, in order, to resolve the dispute from the record rather than from memory.
- Accounts staff reviewing month-end figures use this screen, account by account, as the foundation for the reconciliation and reporting work covered in the main DMS handbook.
- Before raising a Credit Note or Debit Note (Chapters 3 and 4), staff should always view the account's recent entries first, to confirm the correction is actually needed and correctly sized.

2.5 Everyday Impact

- Gives every member of the Accounts team a single, trustworthy view of exactly what has happened on any account, removing the need to reconstruct history from paper files or memory.
- Is the evidence base for resolving customer and supplier disputes quickly and factually.
- Underpins the dealer–TVS running account visibility covered in the main handbook.

2.6 Common Errors and Their Consequences

Error	Downstream Consequence
Wrong account selected when reviewing a dispute	Incorrect conclusion reached, and the real issue remains unresolved
Date range too narrow, missing an older, relevant entry	A pattern or root cause is missed
Running balance not cross-checked before raising a correction	A Credit or Debit Note is raised for the wrong amount

3. Credit Note

A Credit Note is one of the two correction documents covered in this book, and it is the one that works in the dealership's favour when the direction of correction is explained clearly: it reduces what an account owes.

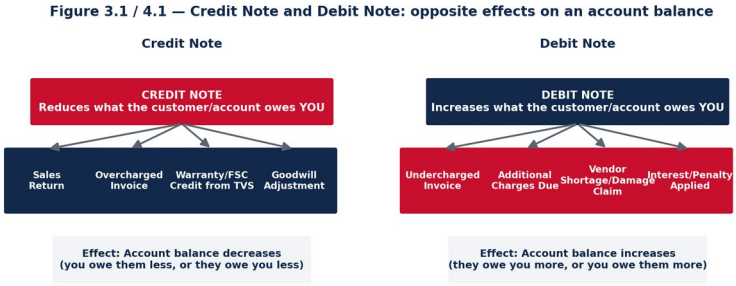
Figure 3.1 / 4.1 — Credit Note and Debit Note: opposite effects on an account balance
Credit Note
Debit Note
CREDIT NOTE
Reduces what the customer/account owes YOU
DEBIT NOTE
Increases what the customer/account owes YOU
Sales Return
Overcharged Invoice
Warranty/FSC Credit from TVS
Goodwill Adjustment
Undercharged Invoice
Additional Charges Due
Vendor Shortage/Damage Claim
Interest/Penalty Applied
Effect: Account balance decreases
(you owe them less, or they owe you less)
Effect: Account balance increases
(they owe you more, or you owe them more)

Figure 3.1 / 4.1 — Credit Note and Debit Note have opposite effects on an account balance.

3.1 Purpose

A Credit Note is a formal document reducing the amount a customer, supplier, or other account owes, issued for a documented, specific reason — never as an informal adjustment made without a paper trail. It reverses value, in whole or in part, from a previous transaction.

3.2 When a Credit Note Is Raised

Situation	Example
Sales return	A customer returns a purchased part or accessory in resalable condition
Overcharged invoice	A billing error is found after the invoice was already issued
Warranty/FSC credit from TVS	TVS approves a warranty or FSC claim, crediting the dealer's account
Goodwill adjustment	A documented, approved gesture reducing a customer's bill after the fact

3.3 Key Fields

Field	Description
Credit Note Number	System-generated, unique reference
Account Affected	The customer, supplier, or other ledger head being credited
Original Reference	The invoice or transaction this credit note relates to
Reason Code	A standard, selectable reason (return, overcharge, warranty credit, goodwill, and so on)
Amount	The value being credited
Approval	Sign-off required above a certain value, per dealership policy

3.4 Approval Discipline

Because a Credit Note directly reduces revenue already recorded, most dealerships require supervisor or manager approval above a defined value threshold, and always require a reason code and a reference to the original transaction — a Credit Note should never be raised as a standalone, unexplained adjustment. This mirrors the discount-control discipline covered in the main DMS handbook's Part Price chapter.

3.5 Everyday Impact

- Gives customers and suppliers a documented, auditable correction rather than an informal promise or a verbal adjustment.
- Is the mechanism through which warranty and FSC claim approvals (covered in the Service Documents handbook) actually land in the dealership's financial records.
- A high volume of Credit Notes against a particular billing type or staff member is a useful early signal worth investigating — it may point to a recurring billing error upstream.

3.6 Common Errors and Their Consequences

Error	Downstream Consequence
Credit Note issued without a reason code or reference	Impossible to audit later; looks like an unexplained revenue loss
Approval threshold bypassed	Unauthorised revenue adjustments go unchecked
Credit Note amount not cross-checked against the original invoice	Over- or under-correction of the account

4. Debit Note

A Debit Note is the mirror image of a Credit Note: it increases what an account owes, and deserves exactly the same documentation discipline, even though it moves the balance in the opposite direction.

4.1 Purpose

A Debit Note is a formal document increasing the amount a customer, supplier, or other account owes, issued for a documented, specific reason. It is most commonly used on the supplier/TVS side of the ledger, though it can apply to a customer account as well where a legitimate undercharge or additional cost needs to be recovered.

4.2 When a Debit Note Is Raised

Situation	Example
Undercharged invoice	A billing error is found where the customer was charged less than owed
Additional charges due	A legitimate cost arises after the original invoice was issued
Vendor shortage/damage claim	Goods received from a supplier were short-shipped or damaged, and the supplier owes a correction
Interest or penalty applied	A contractually agreed late-payment charge is applied to an overdue account

4.3 Key Fields

Field	Description
Debit Note Number	System-generated, unique reference
Account Affected	The customer, supplier, or other ledger head being debited
Original Reference	The invoice, GRN, or transaction this debit note relates to
Reason Code	A standard, selectable reason
Amount	The value being debited
Approval	Sign-off required, particularly for customer-facing debit notes

4.4 Customer-Facing Debit Notes Require Extra Care

Raising a Debit Note against a customer — effectively telling them they now owe more than their original invoice stated — is understandably more sensitive than a Credit Note, and should always be accompanied by a clear, documented explanation communicated to the customer before or alongside the note itself, not discovered by the customer only when they next check their account.

> ***Customer relations reminder:*** *A Debit Note against a customer should never come as a surprise. Explain the reason before or when it is raised, not after the customer has already queried an unexpected balance.*

4.5 Everyday Impact

- Ensures the dealership recovers amounts it is legitimately owed, rather than absorbing undercharges or vendor shortages silently.
- Vendor-side Debit Notes (for shortages or damage on GRN, covered in the main DMS handbook) are how the dealership formally recovers value from a supplier error.
- A well-documented Debit Note trail supports the dealership's position clearly if a dispute with a customer or supplier ever needs to be resolved formally.

4.6 Common Errors and Their Consequences

Error	Downstream Consequence
Debit Note raised against a customer without prior communication	Customer trust damaged, even where the charge is legitimate
Vendor shortage/damage not converted into a Debit Note	Dealership absorbs a cost that should have been recovered from the supplier
Reason code and reference missing	Impossible to justify the charge later if questioned

5. Bank Adjustment

A Bank Adjustment is a correction entry made directly against the dealership's own bank ledger inside the DMS — distinct from a Credit or Debit Note, which affect customer or supplier accounts, and distinct from the bank statement itself, which the dealership does not control.

5.1 Purpose

This function records an adjustment needed to make the DMS bank ledger accurately reflect reality — typically because a bank-side event (a charge, an interest credit, a correction by the bank, a returned/bounced payment) occurred that was not, and could not have been, captured through a normal receipt or payment transaction.

5.2 When a Bank Adjustment Is Used

- Bank charges or fees deducted directly by the bank, not initiated by the dealership.
- Interest earned or credited by the bank on the account balance.
- A cheque or electronic payment that was recorded as received but later bounced or was reversed by the bank.
- A bank-side correction of its own error, once confirmed and documented.

5.3 Key Fields

Field	Description
Adjustment Reference	System-generated, unique reference
Bank Account Affected	Which of the dealership's bank accounts this applies to
Adjustment Type	Bank charge, interest, bounced payment/reversal, bank correction
Amount and Direction	Whether this increases or decreases the DMS bank ledger balance
Supporting Evidence	Bank statement excerpt or advice confirming the adjustment

5.4 Bank Adjustment Is a Correction Tool, Not a Convenience

Because a Bank Adjustment changes the DMS's own record of cash position, it should only ever be used to reflect something that has genuinely happened at the bank, evidenced by the bank statement or a bank advice — never as a quick way to force the DMS balance to match an expected figure without understanding why they differed in the first place. Every Bank Adjustment should be traceable to a specific, documented bank-side event.

> ***Discipline check:*** *If you cannot point to the specific line on the bank statement that justifies a Bank Adjustment, it is not yet ready to be entered — investigate further first.*

5.5 Everyday Impact

- Keeps the DMS bank ledger an accurate reflection of the dealership's real cash position, not just its expected position.
- Captures bank-side events (charges, interest, reversals) that would otherwise never appear in the dealership's own records at all.

- Is the main tool used to resolve differences found during Bank Reconciliation, covered next.

5.6 Common Errors and Their Consequences

Error	Downstream Consequence
Adjustment made without supporting bank evidence	DMS balance is forced to match a number without understanding why, hiding a real problem
Bounced payment not adjusted promptly	Customer or account incorrectly shown as having paid
Bank charges never recorded	True cost of banking operations understated in dealership accounts

6. Bank Reconciliation

Bank Reconciliation is, in many respects, the single most important discipline covered in this handbook — it is the one process that checks the dealership's own DMS records against a source completely outside its control: the bank's own statement.

Download / Obtain Bank Statement
Compare Against DMS Bank Ledger Entries
Match Items Line by Line
Identify Unmatched Items (Adjustments)
Raise Bank Adjustment for Genuine Gaps
Sign Off Reconciliation for the Period

Figure 5.1 — The Bank Reconciliation process, statement to sign-off

Figure 5.1 — The Bank Reconciliation process, statement to sign-off.

6.1 Purpose

Bank Reconciliation is the structured process of comparing every entry in the DMS bank ledger against the corresponding bank statement for the same period, confirming that every item matches, and identifying and resolving any item that appears on one side but not the other.

6.2 Why This Matters More Than Any Other Ledger Check

Every other ledger covered in this book — customer, supplier, general — is built entirely from transactions the dealership itself entered. If a mistake is made, the dealership's own records are internally consistent but still wrong, and nothing inside the DMS alone will necessarily reveal that. The bank statement is different: it is produced entirely independently by the bank, based on what actually happened to the dealership's money. Reconciling against it is the only routine check that can catch an error the dealership's own records would otherwise never expose.

6.3 Step-by-Step Process

54. Obtain the bank statement for the period being reconciled, directly from the bank (not a memory of the expected balance).
55. Using View Ledger Entries (Chapter 2), pull the DMS bank ledger entries for the same period.
56. Match items line by line: every receipt and payment in the DMS should correspond to an entry on the statement, and vice versa.
57. For every unmatched item, investigate the cause before taking any action — timing differences (a cheque not yet cleared) are normal and simply carry forward; genuine discrepancies need resolution.
58. Where a genuine bank-side event explains a gap, raise a Bank Adjustment (Chapter 5) to bring the DMS ledger in line, with the bank statement as supporting evidence.
59. Once every item is matched or explained, sign off the reconciliation for the period, creating a permanent, auditable record that this check was performed.

6.4 Key Fields

Field	Description
Reconciliation Period	The date range being reconciled, typically monthly
Statement Closing Balance	The balance per the bank's own statement
DMS Ledger Closing Balance	The balance per the DMS bank ledger for the same period
Unmatched Items List	Every item present on one side but not (yet) the other
Reconciled Status	Matched / Pending Investigation / Signed Off

6.5 Recommended Cadence

Bank Reconciliation should be performed at least monthly, and ideally more frequently for a busy multi-branch dealer such as Zamoto TVS, since the longer a discrepancy goes unnoticed, the harder it becomes to trace its original cause.

6.6 Everyday Impact

- Is the primary safeguard against fraud, error, or simple oversight going unnoticed in the dealership's cash position.
- Gives the Dealer Admin and Director genuine confidence in the accuracy of reported cash and profitability figures.
- A consistently clean reconciliation history is often required by banks, auditors, or TVS itself as evidence of sound financial management.

6.7 Common Errors and Their Consequences

Error	Downstream Consequence
Reconciliation skipped or done irregularly	Errors and discrepancies accumulate silently over months
Unmatched items left uninvestigated	Genuine problems (fraud, error, bank mistake) go unresolved
Reconciliation not formally signed off	No auditable evidence the check was ever properly performed

7. How These Five Functions Work Together — A Complete Worked Example

This chapter follows a single month-end close at the Lusaka branch to show how View Ledger Entries, Credit Note, Debit Note, Bank Adjustment, and Bank Reconciliation combine in ordinary practice.

7.1 The Scenario

It is the end of the month, and the Accounts team at Zamoto TVS Lusaka is closing the branch's books before the consolidated group report is prepared.

7.2 Step by Step

60. The Accounts assistant opens View Ledger Entries for the branch's main bank account, reviewing every receipt and payment recorded during the month.
61. A customer contacts the branch disputing an invoice amount. View Ledger Entries on that customer's account shows the original invoice and a partial payment, confirming a genuine balance remains — not a system error.
62. While reviewing job card invoices, the team discovers one customer was undercharged due to a labour code entry error. A Debit Note is raised against that customer's account, with a clear explanation provided to the customer directly.
63. A separate customer returned an unused accessory purchased earlier in the month. A Credit Note is raised, referencing the original invoice and the return.
64. Bank Reconciliation is performed for the month: the DMS bank ledger is compared line by line against the actual bank statement.
65. Two items do not initially match: a bank charge the DMS had no record of, and a customer cheque that was recorded as received but has since bounced. Both are resolved with a Bank Adjustment, each backed by the relevant bank statement line as evidence.
66. With every item matched or explained, the reconciliation for the month is signed off, and the branch's month-end financial position is now something the Accounts team can state with genuine confidence.

7.3 What This Demonstrates

None of these five functions operated in isolation. View Ledger Entries was the starting point for every investigation; Credit Note and Debit Note corrected two separate customer-side errors in opposite directions; Bank Adjustment resolved two genuine bank-side events; and Bank Reconciliation was the discipline that surfaced both of those bank-side issues in the first place, rather than allowing them to sit unnoticed. This is what disciplined, monthly Accounts practice actually looks like in a working dealership.

8. Best Practices and Common Mistakes

This closing chapter draws together the recurring themes from every chapter in this book into a single, practical set of habits.

8.1 Golden Rules

67. Always view an account's recent ledger entries before raising any correction against it.
68. Every Credit Note and Debit Note needs a reason code and a reference to the original transaction — never raise one as a standalone, unexplained adjustment.
69. Communicate a customer-facing Debit Note before or when it is raised, never let the customer discover it unexplained.
70. Only raise a Bank Adjustment against genuine, evidenced bank-side events — never to force a balance to match an expectation.
71. Perform Bank Reconciliation at least monthly, and investigate every unmatched item rather than leaving it pending indefinitely.
72. Always sign off a completed reconciliation, creating a permanent, auditable record.

8.2 A Quick Reference: Which Function Do I Need?

Situation	Function to Use
Need to see everything that has happened on an account	View Ledger Entries
Customer was overcharged, or returned goods, or a TVS credit was approved	Credit Note
Customer was undercharged, or a supplier shortage needs recovering	Debit Note
A bank charge, interest, or bounced payment needs recording	Bank Adjustment
Month-end check of the DMS bank ledger against the actual bank statement	Bank Reconciliation

8.3 Closing Thought

These five functions rarely feel urgent in the moment — there is always a customer waiting, a job card to close, a delivery to complete. But they are exactly the functions that determine, months or years later, whether a dealership's financial history can be trusted, defended, and learned from. Treating them with the same care as the customer-facing work covered elsewhere in this series is what turns good workshop and sales performance into a genuinely well-run business.

9. Glossary of Key Terms

A quick-reference glossary of the terms used throughout this handbook.

Term	Meaning
Debit	An entry that increases the amount an account owes.
Credit	An entry that decreases the amount an account owes.
Ledger	A running, chronological record of every transaction against a specific account.
Running Balance	The account balance after each individual entry is applied, in sequence.
Credit Note	A document that formally reduces what an account owes, for a documented reason.
Debit Note	A document that formally increases what an account owes, for a documented reason.
Bank Adjustment	A correction entry made directly against the DMS bank ledger, reflecting a genuine bank-side event.
Bank Reconciliation	The process of matching the DMS bank ledger against the actual bank statement for a period.
Unmatched Item	An entry appearing on the DMS ledger or the bank statement, but not (yet) on both.
Reason Code	A standard, selectable explanation attached to a Credit or Debit Note.

10. Closing Notes

This handbook has covered five functions that, taken together, are what allow a dealership to genuinely know its own financial position rather than assume it. View Ledger Entries gives visibility; Credit Note and Debit Note allow honest, documented correction in either direction; Bank Adjustment and Bank Reconciliation keep the dealership's records anchored to the one source of truth it does not control — its own bank.

New Accounts staff are encouraged to work through this handbook alongside supervised practice on the live system, ideally completing at least one full monthly Bank Reconciliation, and raising at least one Credit Note and one Debit Note under supervision, before taking on these responsibilities independently.

— End of Handbook —

Compiled by श्री. योगेश मिरजकर

PART V

Parts & Service Reports Catalogue

This part is a dedicated reference to nineteen standard DMS reports — ten covering Spare Parts operations and nine covering Service operations — organised by code family, with a suggested reporting rhythm for using them well.

Chapters in this part:

- Introduction: Understanding the Report Code System
- Parts Invoicing Reports
- Parts Data Maintenance
- Parts Stock and Inventory Reports
- Parts Performance and Sales Analytics
- Service Scheduling Report
- Service Transaction and Compliance Reports
- Service Management Reports
- Service PSF and Customer Satisfaction Reports
- Building a Reporting Rhythm — A Complete Worked Example
- Best Practices Across the Reports Catalogue
- Glossary of Key Terms
- Closing Notes

1. Introduction: Understanding the Report Code System

The TVS DMS Reports module organises its many available reports under short, structured codes rather than long free-text names — once you understand the logic behind these codes, finding the right report becomes far faster than browsing a long alphabetical menu.

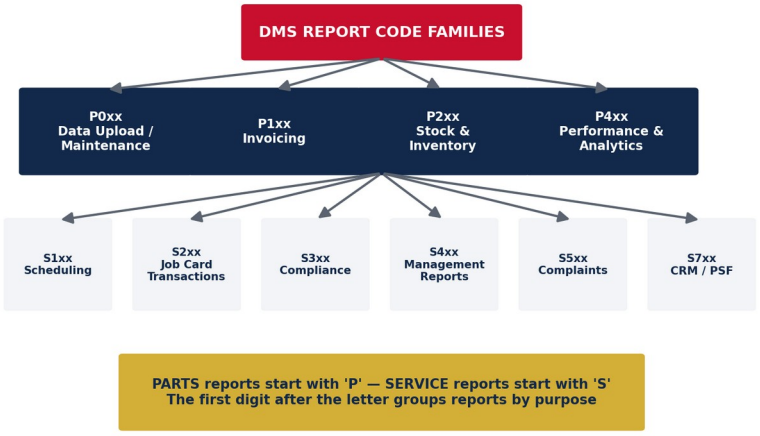

Figure 1.1 — How TVS DMS report codes are organised into families

Figure 1.1 — How TVS DMS report codes are organised into families.

1.1 The Letter Prefix

Prefix	Report Domain
P	Parts — spare parts stock, invoicing, and performance
S	Service — job cards, scheduling, quality, and customer follow-up

1.2 The Number Range

Within each letter prefix, the leading digit groups reports by purpose. This handbook covers reports across the following ranges:

Range	Typical Purpose	Covered in This Book
P0xx	Data upload / maintenance utilities	P001
P1xx	Invoicing	P101, P102
P2xx	Stock and inventory	P201, P204, P205, P209, P210
P4xx	Performance and sales analytics	P401, P402
S1xx	Scheduling and reminders	S102
S2xx	Job card transaction detail	S201
S3xx	Compliance / statutory reporting	S306

Range	Typical Purpose	Covered in This Book
S4xx	Management summary reports	S401
S5xx	Complaint / quality tracking	S502
S7xx	CRM / PSF and customer satisfaction	S702, S703, S704, S706

1.3 The Nineteen Reports Covered in This Book

Chapters 2 through 9 take these nineteen reports in grouped order, following the code families above. Each report entry follows the same consistent structure — purpose, what it typically shows, when to use it, and who uses it — so that once you are comfortable reading one report entry, every other one in this book follows the same pattern.

> ***A note on terminology:*** *A small number of codes in this book — particularly BTS (Chapter 7) and IRD (Chapter 7) — are used with local or country-specific variation across the TVS dealer network. Where this book cannot state a single, universal expansion with confidence, it says so directly and explains the report's functional purpose instead.*

2. Parts Invoicing Reports

These two reports cover the billing side of the parts counter — a summary listing and the underlying invoice detail behind it.

P101 — Parts Invoice Listing

A summary listing of every parts invoice raised over a selected period, giving a quick, scannable overview of parts billing activity without opening each invoice individually.

What it typically shows:

- Invoice number, date, and customer/job card reference for each parts sale
- Invoice value and payment status (paid, pending, partial)
- Branch, and counter sale versus job-card-issue split
- Filterable by date range, branch, and staff member

When to use: Daily, as a quick check of the day's parts billing activity, and at month-end to reconcile total parts revenue against Accounts. | **Who uses it:** Parts Manager, Accounts, Dealer Admin.

> ***Tip:*** *Use this listing first to spot anything unusual (an unusually large invoice, an unusual number of pending-payment invoices) before drilling into individual invoices with P102.*

P102 — Parts Invoices

The detailed, line-by-line view of individual parts invoices — the itemised detail behind each summary line shown in P101.

What it typically shows:

- Every part number, quantity, and price on a specific invoice
- Tax breakdown per invoice
- Linked job card reference, where the sale was issued against a job card rather than a counter sale
- Full customer and payment detail for that specific invoice

When to use: When a specific invoice needs to be reviewed in full detail — for a customer query, an audit, or investigating an anomaly flagged in P101. | **Who uses it:** Parts Manager, Accounts, Dealer Admin, and Customer Service when resolving a billing query.

3. Parts Data Maintenance

This short chapter covers a single, easily overlooked report that matters primarily to whoever is responsible for uploading bulk parts data into the DMS.

P001 — Parts Excel Upload History

A log of every bulk data upload performed into the Parts module via spreadsheet import — for example, a bulk price update, a new part number batch, or a stock adjustment upload — recording what was uploaded, when, by whom, and whether it succeeded.

What it typically shows:

- Upload date and time, and the staff member who performed it
- File name and record count included in the upload
- Success/failure status for the batch, and error details for any rejected rows
- Type of upload (price update, new parts, stock adjustment, and so on)

When to use: Immediately after any bulk upload, to confirm it completed correctly, and whenever a recent bulk change needs to be traced or investigated. | **Who uses it:** Dealer Admin, Parts Manager.

> ***Tip:*** *Always check P001 immediately after a bulk upload rather than assuming it succeeded — a partially failed upload can leave the parts master in an inconsistent state that is much harder to diagnose later if it goes unnoticed.*

4. Parts Stock and Inventory Reports

These five reports work together to give a complete, accurate picture of what parts stock the dealership actually holds, where it is, and whether the system's record matches physical reality.

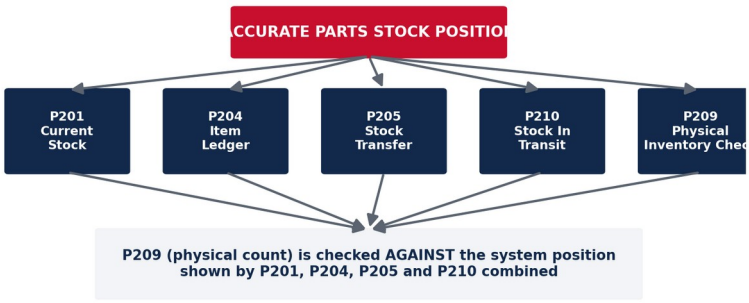
CCURATE PARTS STOCK POSITIO
P201 Current Stock
P204 Item Ledger
P205 Stock Transfer
P210 Stock In Transit
P209 Physical Inventory Che
P209 (physical count) is checked AGAINST the system position shown by P201, P204, P205 and P210 combined

Figure 4.1 — How the parts stock-accuracy reports relate to each other

Figure 4.1 — How the parts stock-accuracy reports relate to each other.

P201 — Parts Current Stock

The real-time snapshot of exactly how many units of every part number are currently held in stock, at the selected branch or godown.

What it typically shows:

- Part number, description, and current quantity on hand
- Stock value at current Part Cost
- Branch/godown location breakdown for multi-location dealers
- ABC–XYZ classification, where configured (see the Master Data handbook)

When to use: Daily, especially before placing a purchase order or promising a part to a customer. | **Who uses it:** Parts Manager, Store Keeper, Purchase staff.

P204 — Parts Item Ledger

The complete transaction history for a single part number — every GRN, every issue, every return — in chronological order, similar in spirit to View Ledger Entries but for a physical part rather than a financial account.

What it typically shows:

- Every stock movement (in and out) for the selected part number
- Reference document for each movement (GRN number, job card, invoice, transfer)
- Running stock balance after each movement
- Date and staff member responsible for each entry

When to use: Whenever a part's current stock figure looks wrong, or a movement needs to be traced (why did this part's stock drop last Tuesday?). | **Who uses it:** Parts Manager, Store Keeper, Dealer Admin during investigation.

> **Tip:** *This is the parts-side equivalent of View Ledger Entries from the Ledger & Accounts handbook — always check the item ledger before assuming a stock figure is simply wrong.*

P205 — Parts Stock Transfer Details

A record of every stock transfer between branches or godowns, showing what moved, when, and whether the transfer has been confirmed as received at the destination.

What it typically shows:

- Transfer reference number, source and destination branch/godown
- Part numbers and quantities transferred
- Dispatch date and received-confirmation date
- Status: In Transit / Received / Discrepancy

When to use: Whenever a stock transfer is initiated, and regularly reviewed to ensure no transfer is left unconfirmed for an extended period. | **Who uses it:** Store Keeper at both source and destination branch, Parts Manager.

P209 — Physical Inventory Check

The record of physical stock-count exercises — whether a full annual stock take or the smaller, rotating cycle counts recommended in the main DMS handbook — comparing the physically counted quantity against the system quantity for each part checked.

What it typically shows:

- Part numbers included in the count, and the count date
- System quantity versus physically counted quantity
- Variance (shortage or surplus) for each part counted
- Adjustment status: whether a variance has been investigated and corrected

When to use: During and immediately after every cycle count or full stock take. | **Who uses it:** Store Keeper, Parts Manager, Dealer Admin for variance sign-off.

P210 — Parts Stock In Transit

A live view of parts that have been ordered or dispatched but not yet physically received into the branch's stock — covering both incoming purchase orders from TVS/distributor and inbound stock transfers from another branch.

What it typically shows:

- Expected part numbers and quantities not yet received
- Source (purchase order or inter-branch transfer)
- Expected arrival date
- Days outstanding, to flag anything overdue

When to use: Weekly, to anticipate incoming stock for purchase planning, and to follow up anything overdue. | **Who uses it:** Parts Manager, Store Keeper.

> **Tip:** *P210 is what should be checked before assuming a part is simply 'out of stock' — it may already be on its way.*

5. Parts Performance and Sales Analytics

Where the previous chapter's reports answer 'what do we have', these two reports answer 'how well is it selling', which is the foundation of good purchasing and stocking decisions.

P401 — Parts Performance

A broad performance view of the parts business, typically covering sales value, margin, and turnover by part, category, or branch over a selected period.

What it typically shows:

- Sales value and quantity by part number or category
- Margin achieved (Part Price versus Part Cost, per the Master Data handbook)
- Stock turnover rate, highlighting fast- and slow-moving categories
- Branch-wise comparison for multi-branch dealers

When to use: Monthly, as part of the management review cycle covered in the main DMS handbook. | **Who uses it:** Parts Manager, Dealer Admin, Director.

P402 — Parts Monthly Average Sales

The average monthly consumption of each part number, calculated over a rolling or defined historical period — the single most important figure for setting sensible reorder points and purchase quantities.

What it typically shows:

- Average monthly sales quantity per part number
- Trend indication (increasing, stable, or declining demand)
- Suggested reorder point/quantity, where the DMS calculates this automatically
- Comparison against current stock (P201) to flag over- or under-stocked items

When to use: Before placing purchase orders, and during the ABC–XYZ stocking policy review described in the Master Data handbook. | **Who uses it:** Parts Manager, Purchase staff.

> ***Tip:*** *P402 combined with P201 (Current Stock) is the most direct way to answer 'am I about to run out, or am I overstocked' for any given part.*

6. Service Scheduling Report

A single report opens the Service reports section: the one responsible for keeping customers coming back for their next scheduled visit.

S102 — Service Reminder

The operational report listing every customer whose vehicle is due, or soon due, for a free service, paid service, or scheduled maintenance, based on the trigger logic (date or mileage) described in the Service Documents handbook.

What it typically shows:

- Customer and vehicle details for every due or upcoming reminder
- Reminder trigger reason (date-based or mileage-based)
- Reminder status: not yet sent / sent / responded / booked
- Days overdue, for reminders that have gone unanswered

When to use: Daily or weekly, to drive the outbound reminder calling/messaging effort. | **Who uses it:** CRM/Front Office staff, Service Advisor, Service Manager.

> ***Tip:*** *Treat a growing 'overdue, no response' count on this report as an early warning sign for declining service retention, worth raising in the weekly management review.*

7. Service Transaction and Compliance Reports

This chapter covers three reports that trace exactly what was consumed and done on job cards, and one that supports statutory/regulatory compliance.

S201 — Parts / Labour Issued to Job Cards

A detailed listing of every part and every labour operation issued or logged against job cards over a selected period, linking the Service and Parts sides of the DMS together in one view.

What it typically shows:

- Job card number, date, and technician for each entry
- Part numbers and quantities issued per job card
- Labour codes and time logged per job card
- Free (FSC/Warranty) versus chargeable split

When to use: Daily, to monitor workshop activity, and whenever job costing needs to be reviewed for a specific job card or period. | **Who uses it:** Service Manager, Parts Manager, Dealer Admin.

S706 — BTS Part Issued

A report tracking parts issued under the dealership's BTS category of work — a designation used with some local variation across the TVS network, but functioning in every case as a distinct tracking category for parts issued outside the standard job-card-billed flow (for example, bulk/trade supply, or a specific bulk-to-stock movement type configured locally).

What it typically shows:

- Part numbers and quantities issued under the BTS category
- Reference document and destination for each issue
- Date and staff member responsible

When to use: As part of the regular parts-issue review, particularly where BTS issues sit outside normal job-card billing and need separate tracking for accuracy. | **Who uses it:** Parts Manager, Dealer Admin.

> ***Tip:*** *Confirm the exact local meaning and use of 'BTS' with your Dealer Admin, since this designation is configured somewhat differently across the TVS dealer network.*

S306 — IRD Compliant Data Report

A structured data export formatted to meet the statutory or tax-authority reporting requirements applicable in the dealership's operating market — IRD being a common shorthand across several markets for the relevant revenue/tax authority, though the exact authority and format depend on the country the dealership operates in.

What it typically shows:

- Transaction data formatted to the applicable statutory reporting standard
- Tax collected/payable summary for the reporting period
- Any fields specifically mandated by the local revenue authority

When to use: Per the statutory filing cadence required in the dealership's market — commonly monthly or quarterly. | **Who uses it:** Accounts, Dealer Admin, and the dealership's external accountant/auditor where applicable.

> ***Tip:*** *Confirm with your Accounts team and local tax advisor exactly which authority and filing requirement S306 is configured to satisfy in your market, since this varies by country.*

8. Service Management Reports

These two reports give Service management a step back from individual job cards to see overall workshop performance and recurring quality issues.

S401 — Monthly Service Report

A consolidated monthly summary of workshop activity and performance, drawing together job card volumes, revenue, and productivity into a single management-level view.

What it typically shows:

- Total job cards by type (free, paid, warranty, accident) for the month
- Service revenue and labour utilisation
- Technician productivity summary
- Branch-wise comparison for multi-branch dealers

When to use: Monthly, as the core input to the management review meeting described in the main DMS handbook. | **Who uses it:** Service Manager, Dealer Admin, Director.

S502 — Top Complaints

A ranked view of the most frequently recorded customer complaints or repeat-repair issues over a selected period, helping management identify systemic problems rather than treating each complaint as an isolated event.

What it typically shows:

- Complaint category and frequency count
- Affected model(s), where a pattern is model-specific
- Trend over time (increasing, stable, or decreasing frequency)
- Link to related PPFR reports, where a complaint pattern has been escalated (see the Service Documents handbook)

When to use: Monthly, and whenever a specific complaint type appears to be rising. | **Who uses it:** Service Manager, Dealer Admin, and feeding into PPFR escalation where a pattern is confirmed.

> ***Tip:*** *A single complaint is an isolated event; the same complaint appearing repeatedly on this report is a signal worth investigating at the root-cause level, not just repairing case by case.*

9. Service PSF and Customer Satisfaction Reports

These three reports work together as a single family covering Post Service Follow-up (PSF), from a management-level summary down to the individual dissatisfied-customer case.

Job Card Closed
PSF Call Due (per schedule)
S702: PSF Due vs Done Summary management view
S703: PSF Register (call-by-call log)
Customer Found Dissatisfied?
S704: Dissatisfied Customer Tracking Register

Figure 9.1 — How the PSF report family (S702, S703, S704) works together

Figure 9.1 — How the PSF report family (S702, S703, S704) works together.

S702 — Service PSF Due Done Summary

A management-level summary comparing how many PSF calls were due against how many were actually completed over a selected period — the headline indicator of whether the PSF process, described in the Service Documents handbook, is genuinely being followed.

What it typically shows:

- Total PSF calls due, by branch and by advisor/team
- Calls completed versus outstanding
- Completion rate as a percentage
- Trend over recent periods

When to use: Weekly and monthly, as a core discipline metric for the service team. | **Who uses it:** Service Manager, Dealer Admin.

S703 — PSF Register

The detailed, call-by-call log behind the S702 summary — every individual PSF call, its outcome, and the talking points covered, per the dealership's PSF script.

What it typically shows:

- Job card reference and customer for each PSF call
- Call date, staff member who made the call, and outcome
- Satisfaction result: satisfied / dissatisfied
- Notes captured during the call

When to use: Reviewed regularly by the Service Manager, and consulted whenever a specific customer's PSF outcome needs to be checked. | **Who uses it:** Service Manager, CRM/Front Office staff performing the calls.

S704 — Dissatisfied Customer Tracking Register

A dedicated register for every customer identified as dissatisfied during PSF (or through any other channel), tracked through to genuine resolution rather than simply logged and left, per the escalation discipline described in the Service Documents handbook.

What it typically shows:

- Customer and job card reference for each dissatisfied case
- Reason for dissatisfaction, in the customer's own words where possible
- Escalation owner and current status
- Resolution date and outcome, once closed

When to use: Reviewed continuously by whoever owns customer satisfaction, and specifically in every management review meeting until every open case is resolved. | **Who uses it:** Service Manager, Dealer Admin, and TVS regional office for cases requiring escalation beyond dealer level.

> ***Tip:*** *An open case sitting on this register for an extended period without movement is a bigger reputational risk than the original complaint itself — review this register specifically for age, not just volume.*

10. Building a Reporting Rhythm — A Complete Worked Example

Knowing what a report shows is only half the value; the other half is reviewing the right report at the right frequency, as part of a genuine, repeated management habit rather than an occasional exercise.

Figure 11.1 — A suggested reporting rhythm across the 19 reports in this book

Figure 11.1 — A suggested reporting rhythm across the 19 reports in this book.

10.1 A Suggested Reporting Rhythm

Cadence	Reports Reviewed	Typical Owner
Daily	P201, P210, S201	Store Keeper, Service Advisor
Weekly	P205, P209, S102, S703	Parts Manager, Service Manager
Monthly	P101, P102, P401, P402, S401, S502, S702, S704, S306	Dealer Admin, Director

10.2 A Worked Example: The Monday Morning Review

At Zamoto TVS Lusaka, the Parts Manager and Service Manager begin each Monday with a short, structured review before the branch opens to customers.

73. P201 (Current Stock) is checked against P210 (Stock In Transit) to confirm what is genuinely available this week versus what is still incoming.
74. P205 (Stock Transfer Details) is reviewed for any transfer still showing 'In Transit' beyond its expected arrival, and followed up directly with the sending branch.
75. S102 (Service Reminder) is reviewed for the coming week's due list, and any overdue, unanswered reminders are assigned for a fresh follow-up call.
76. S703 (PSF Register) from the previous week is scanned for any dissatisfied outcome not yet reflected on S704 (Dissatisfied Customer Tracking Register), and any gap is corrected immediately.
77. Once a month, this same Monday slot is extended to include P401, P402, S401 and S502, forming the basis of the fuller monthly management review described in the main DMS handbook.

10.3 Why the Rhythm Matters More Than Any Single Report

A dealership that occasionally, irregularly glances at these reports gets only a fraction of their value. A dealership that reviews the right report on a fixed, repeated schedule catches a slow-moving stock problem, a rising complaint pattern, or a slipping PSF completion rate while it is still small and easy to correct — which is the entire purpose of building this rhythm into the working week rather than treating reports as something to consult only when a problem has already become visible elsewhere.

11. Best Practices Across the Reports Catalogue

This closing chapter draws together practical habits for using these nineteen reports well, and a quick-reference guide for finding the right one.

11.1 Golden Rules

78. Learn a report's code, not just its name — codes are faster to search and less ambiguous in conversation with colleagues and TVS support.
79. Match review frequency to the report's purpose: fast-moving operational reports (stock, transit) daily; management and compliance reports monthly.
80. Never treat a report as read-only information — every report in this book exists to trigger a specific action when something looks wrong.
81. Cross-reference related reports rather than reading one in isolation, particularly within the Parts stock family (Chapter 4) and the PSF family (Chapter 9).
82. Where a report code or term is used with local variation (BTS, IRD), confirm the exact local configuration with your Dealer Admin rather than assuming.

11.2 Quick Reference: Which Report Do I Need?

Question	Report to Check
How much of this part do we currently have?	P201
Why did this part's stock change?	P204
Is a transfer between branches still pending?	P205
Did our physical count match the system?	P209
Is more stock of this part already on the way?	P210
How well is a part or category actually selling?	P401 / P402
Which customers are due for service?	S102
What was issued against job cards recently?	S201
Are PSF calls actually being completed?	S702
What happened on a specific PSF call?	S703
Which customers remain genuinely dissatisfied?	S704
What are our most common recurring complaints?	S502

11.3 Closing Thought

A DMS full of accurate transactions but never reviewed through its reports is a filing cabinet, not a management tool. These nineteen reports are how the daily discipline covered throughout this handbook series — accurate job cards, accurate stock movements, honest PSF calls — actually becomes visible, measurable, and improvable over time.

12. Glossary of Key Terms

A quick-reference glossary of the terms used throughout this handbook.

Term	Meaning
GRN	Goods Receipt Note — referenced in several parts stock reports (see the Master Data handbook).
PSF	Post Service Follow-up — a structured customer contact after service delivery (see the Service Documents handbook).
FSC	Free Service Coupon — the scheduled free services included with a new TVS vehicle.
Cycle Count	A rotating partial physical stock count, reflected in P209.
Variance	The difference between a system-recorded quantity/value and a physically confirmed one.
Turnover Rate	How quickly stock of a given part is sold and replenished, shown in P401.
Reorder Point	The stock level at which a new purchase order should be triggered, informed by P402.
BTS	A locally-configured parts-issue tracking category; confirm exact local meaning with your Dealer Admin.
IRD	Shorthand for the relevant tax/revenue authority in the dealership's operating market; the exact authority varies by country.

13. Closing Notes

This handbook has covered nineteen reports across the Parts and Service sides of the TVS DMS — not as an exhaustive list of every report the system offers, but as the core set that a well-run dealership consults on a genuine, repeated schedule. Learning what each one shows is the easy part; building the habit of actually reviewing them, on the rhythm suggested in Chapter 10, is what turns this catalogue from reference material into a working management tool.

New Parts and Service staff are encouraged to work through this handbook alongside guided practice on the live reports, ideally sitting in on at least one full weekly and one full monthly review cycle before taking ownership of any of these reports independently.

— End of Handbook —

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